MARKETING & MEDIA DECISIONS

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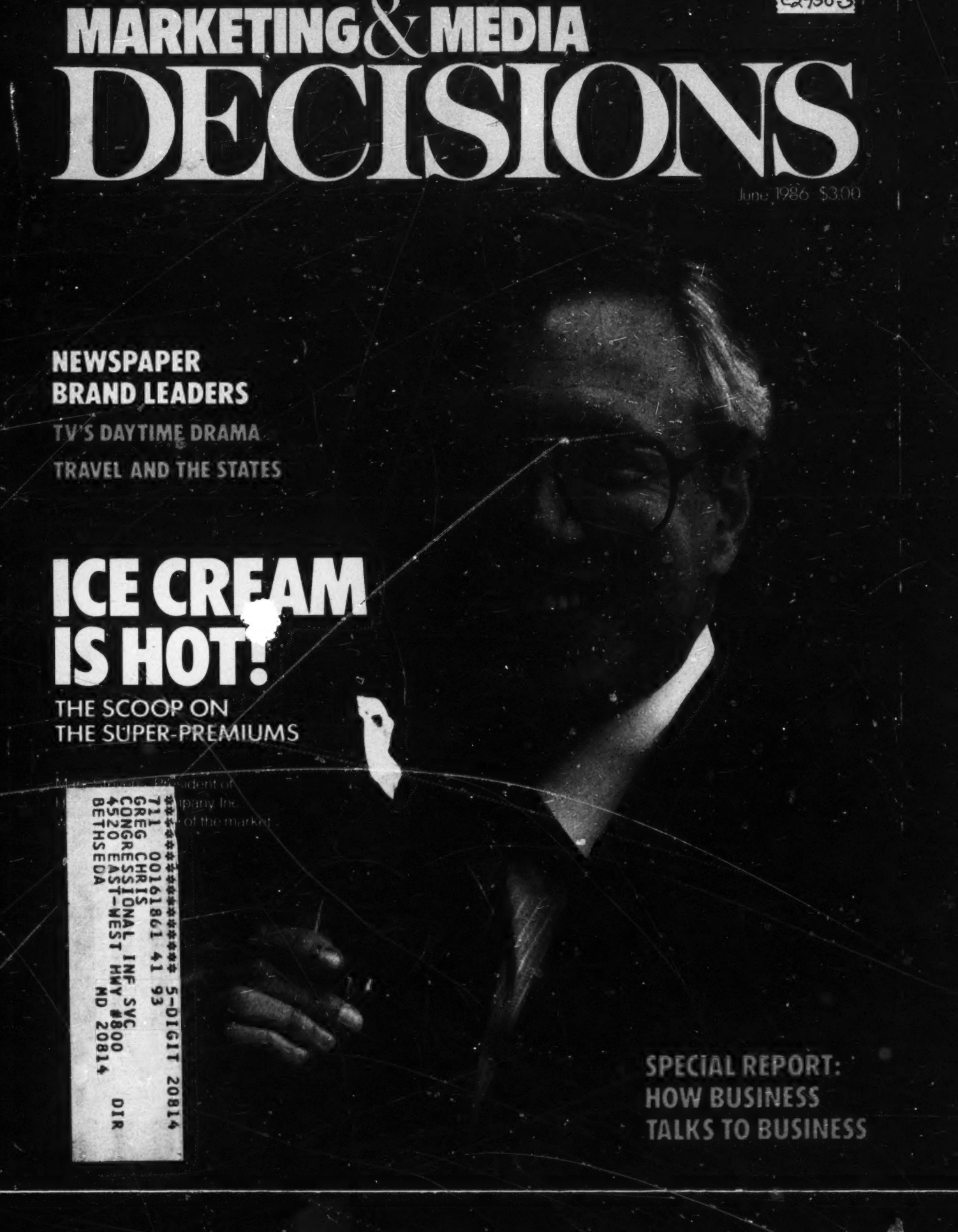

NEWSPAPER BRAND LEADERS

TV'S DAYTIME DRAMA

TRAVEL AND THE STATES

ICE CREAM IS HOT!

THE SCOOP ON THE SUPER-PREMIUMS

SPECIAL REPORT: HOW BUSINESS TALKS TO BUSINESS

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MARKETING & MEDIA DECISIONS

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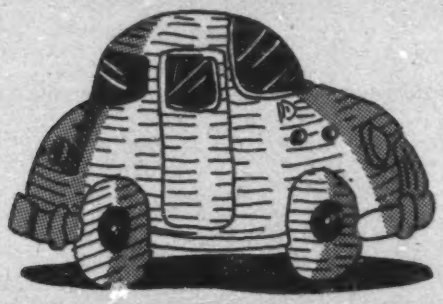

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FREEZE FRAME

by Rich Zahradnik

REWINDING VCR PENETRATION

The big problem with counting VCR's and their usage stems from analysts who figure U.S. penetration by using raw sales figures. It's a method that doesn't take into account second VCR homes or those machines that have been bought to replace aging first-generation units.

The Electronic Industries Association has done something in the way of solving the problem. The EIA's Consumer Electronics Group, which represents consumer electronics manufacturers, sent Market Facts Inc. into the field to survey 10,000 households — 7,500 of the survey forms were actually completed. The research firm came back with revealing figures about the use of and future for the video machines in American households.

According to the study's findings, 35% of U.S. households owned VCR's at the end of 1985. The figure is higher than some experts expected, and EIA officials even said they think the number is probably closer to 33%. Still in all, 33% is a higher penetration than the EIA's VCR sales statistics would indicate, confirming one theory that the EIA has consistently underestimated VCR sales in this country.

The study also found 85% of VCR households have one machine, while another 11% own two and 3% own three or more.

"First-time purchasers still account for the great majority of units sold — in 1985, 83% of VCR's sold were purchased by first-time buyers," Market Facts reported. "Replacements represented 5% of sales, while upgrades and additional VCR's accounted for 12%."

The importance of the VCR as a home entertainment option was highlighted by the astounding 95% of VCR owners who said they would replace their machine if it stopped working. On purchase intentions, 37% of all households polled indicated they were very likely or somewhat likely to purchase a VCR, camcorder or video camera in the next 12 months.

	%
VCR owners	35
Non-VCR owners	65
Base: All Households	(7,525)

INCIDENCE OF HOUSEHOLDS OWNING VCR'S AT THE END OF 1985

Number of VCR's in Use	% VCR Owners
One	85
Two	11
Three or more	3
Base: VCR Households	(2,700)

VCR'S IN USE

ELKES SEES SPOTS ON PAY — SOMEDAY

Terrence Elkes, president and chief executive officer of Viacom International, thinks there may be room on the pay services for advertising. Elkes' views are important, since Viacom now owns all of Showtime and The Movie Channel.

Elkes says certain types of pay services might be able to carry advertising because consumers perceive a channel like Showtime not as specifically a pay service, but as a just one of many tv offerings. "Preliminary studies indicate that lack of advertising is not . . . the greatest reason people subscribe to pay tv," Elkes said during a recent New York speaking engagement.

Ads could get mixed in with the movies on pay cable, he explained, "if ultimately we conclude that the customer" does not perceive the value of a service decreases with the addition of advertising. But Elkes was quick to warn Viacom's research is preliminary. Whether or not ads will be sold on Showtime or TMC is not something Viacom will decide in 1986.

It's clear Elkes has advertising opportunities on his mind. In the same speech, he pointed out that pay-per-view services — Showtime runs one called Viewer's Choice — would also be nice vehicles for advertising, particularly since the PPV services have lots of "dead" air between the films.

AS THE DAYTIME TURNS

Will declining audience numbers force advertisers to rush into the arms of other dayparts or media? Stay tuned.

by
Marianne Paskowski

CBS'* As The World Turns, *circa 1958 and today.

How badly is network daytime tv listing? That's a question many daytime advertisers and their agencies were asking last month as they grudgingly prepared to part with their dollars for the 1986-87 upfront television buying season.

In a period where marketers remain reluctant to loosen up on the media reins, spending on daytime tv, with all its inherent problems, is under close scrutiny. Declining audiences resulting from more women entering the work force; a soft tv market; increased clutter from the wide use of 15-second commercials; inattentive viewers; plus mixed reviews from the people meter have given buyers reason to pause and ponder other media alternatives.

"While some of that daytime money is going to print, most of the dollars leaving are going to other tv forms, like cable and syndication," notes Mike Moore, D'Arcy Masius Benton & Bowles' media director.

Daytime television, once regarded as the workhorse daypart and the most efficient way to reach women, is now "the damaged daypart," Moore says. So much so that daytime spenders like Ralston Purina's William Claggett, vice president, director of marketing and advertising, envisions that many advertisers will hang back for the scatter market this year instead of going upfront with daytime purchases.

"From a pure numbers' point of view, you would have been better off last year if you had held out for scatter," points out Claggett. Last year, Ralston spent $12 million on the medium, according to Broadcast Advertisers Reports.

The networks, too, acknowledge a softness with the daypart. "The money spent in 1985-86 has not come up to anybody's expectations," admits John Tiedemann, Jr., senior vice president, national sales manager, ABC Television Network.

But Tiedemann is equally quick to defend daytime, where ABC reigns supreme. While ABC is second in overall household ratings at a 6.6 rating/21 share, the network leads with a 6.3 rating in attracting women aged 18-49. CBS is second in women 18-49, posting a 4.3, and NBC is a distant third at 3.7. CBS leads the overall daytime household ratings race at 6.6/21, but has dropped 3% in households compared with a year ago. NBC trails be-

ABC's Tiedemann defends daytime, where ABC reigns with women 18-49.

STEVE BEGLEITER

hind with a 5.4/18, representing a 4% gain in households over last year.

Tiedemann dismisses the downbeat talk surrounding daytime as "just posturing" before the upfront. "Daytime is a medium that belongs in everybody's media plan because it does its job — it reaches women frequently, efficiently and effectively," he charges.

Daytime's pricing has always been its main attraction. The average cost of a 30-second commercial in daytime tv is $15,000, compared with the average price in prime time of $100,000. In daytime, a high-rated soap opera like *General Hospital* can command $35,000-$40,000 while a poorly-rated game show will go for only $6,000.

That kind of unit cost makes it easy for some advertisers to overlook daytime's warts, says Robert Powell, director of advertising, for Kraft Inc., one of daytime's big spenders. Last year, according to Broadcast Advertisers Reports, Kraft spent $36 million on daytime.

"You'll find that some brands go to daytime just because it is cheaper than anything else. So they live with the negatives, knowing that at least they are on network television," he reasons.

Considering that 1985 was rough for media sales overall, daytime didn't do too badly. While prime time revenues were down 3% last year, daytime spending was actually up slightly, according to the Television Bureau of Advertising. The networks, which have enjoyed 8%-10% gains in daytime revenues for the past 10 years, realized only a 3% rise in 1985, despite the fact that CPM increases were double-digit. According to TvB, daytime television for all three networks last year, Monday-Friday, billed $1.65 billion.

But daytime has gone soft during the past six months, with demand for the daypart in the network scatter market virtually nonexistent. Because of that lack of demand, buyers now expect only slight-to-modest increases this upfront. "We may be in the midst of a corrective cycle with daytime prices," reasons Wesley Dubin, Needham Harper Worldwide's senior vice president, director, national broadcast programming. "The price of daytime shot up dramatically in the last eight to 10 years on an index basis," he continues, "because it was a relatively inexpensive place to advertise in high inflation periods. But when you're in a period of price stability," Dubin continues, "that daypart looks a little less attractive when you're not buffeted by high media inflation," he adds.

Nor is Dubin alone in his reading of the daytime market. "Right now daytime does not have a good name," concurs Gary Carr, SSC&B's vice president of network television, who senses that everyone is getting a little nervous about the daypart. "The advantage of daytime once was that it cost half as much as prime, but now, if you can buy prime for the same CPM and get less clutter, maybe prime is better," he concludes.

At NBC, third down on the ladder in daytime sales, Robert Blackmore, senior vice president, sales, admits that daytime is a little on the soft side. "Advertisers are searching for the best media mix, taking into account the

working women situation," Blackmore begins. That's why dual audience prime time shows like NBC's *Miami Vice*, *Hill Street Blues* and *Cheers* and ABC's *Moonlighting* have done well, he points out.

"What will happen next," Blackmore predicts, "is that as prime time prices go up, lower priced dayparts like daytime and fringe will once again become more attractive. We are in a stable period now and I think there will be a meeting of the minds," Blackmore concludes.

Clearly there will be plenty to mull over about daytime tv before that happens. What to do about declining viewership in that daypart is one persistent question. In 1980, the three-network audience share was 88. Daytime audience for the first quarter 1986 shows the three networks dropped one share, down from a 62 to a 61. That seems to reflect a slowing of erosion from a year earlier when the three networks combined plummeted from a 67 to 62.

Buyers are also worried about daytime's cluttered environment. While daytime television has always carried more commercial time — 12 minutes an hour, versus six in prime time — many :15's are now finding their way into that daypart. About half of the :15's or split :30's now being used, estimate the networks, find their way to daytime schedules.

SSC&B, Carr reports, just completed a study for the Association of National Advertisers which shows that 20% of daytime's commercials are now :15's. "Everyone is worried about the clutter of daytime, and now with :15's, it will be twice as cluttered," Carr points out.

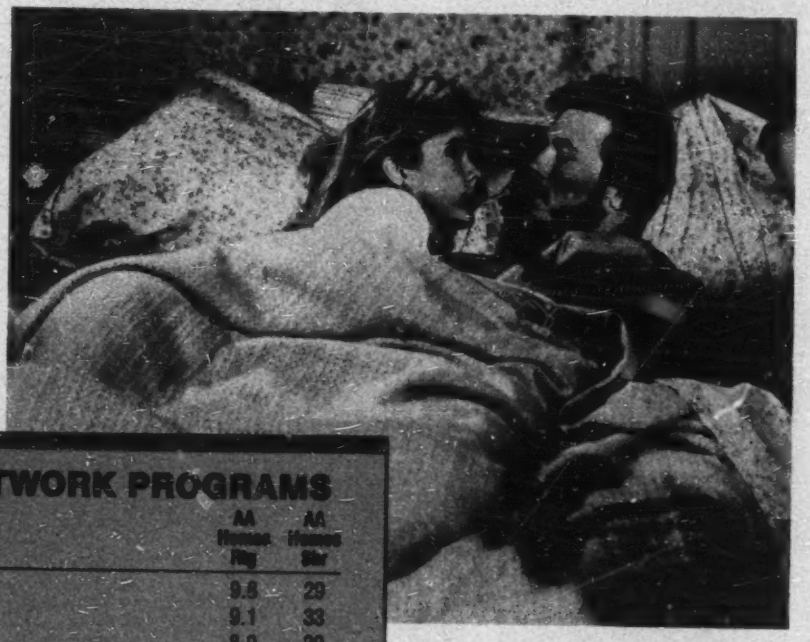
And daytime will get more crowded. In early May, ABC finally relented and began accepting stand-alone :15's, as CBS does. NBC, at press time, was evaluating the matter.

Making daytime's picture even more fuzzy is data coming from the people meter tests. While prime time numbers are generally lower in the people meter reports than in Nielsen's diary, so far, daytime numbers from the people meter seem to be higher.

"It's going to be very interesting to see what happens in daytime with the people meters," points out DMB&B's Moore. While the numbers change week to week as more households are added, Moore notes that there appear to be more men and teens watching daytime, "people who may not claim to watch soap operas in the diaries."

The networks, however, say it is premature to read any significance into the early findings — even if it spells good news for daytime — because of the small samples. "The results have been dramatically different month to month, as we really don't have enough information," explains ABC's Tiedemann.

Last spring, the now-defunct Television Audience Assessment Inc. gave daytimers even more cause to worry. TAA's mission was to provide qualitative measures for tv programing. While it was widely heralded, few ad-



ABC's* General Hospital *still leads the pack.

TOP 25 DAYTIME NETWORK PROGRAMS

Rank		AA Homes Rtg	AA Homes Shr
1	General Hospital ABC	9.5	29
2	Price Is Right 2 CBS	9.1	33
3	Young and the Restless CBS	8.9	29
4*	All My Children ABC	8.6	26
5*	One Life to Live ABC	8.3	26
6	Days of Our Lives NBC	7.9	24
7	Wheel of Fortune NBC	7.6	20
8	Price Is Right 1 CBS	7.2	27
	As the World Turns CBS	7.2	22
10*	Guiding Light CBS	7.0	21
11	Scrabble NBC	5.8	21
12	Capitol CBS	5.4	18
	Another World NBC	5.4	17
14	$25,000 Pyramid CBS	5.3	20
15	New Card Sharks CBS	4.8	18
16	Sale of the Century NBC	4.7	18
17	Santa Barbara NBC	4.5	13
18*	Loving ABC	4.4	14
19	Family Ties M-F NBC	4.3	16
20	Super Password NBC	4.2	14
21	Threes a Crowd Daytime ABC	3.4	11
22	Ryan's Hope ABC	3.2	11
23	Search for Tomorrow NBC	3.0	10
24	How Love American Style ABC	2.8	10
25	Press Your Luck CBS	2.2	6

vertisers were willing to put their money behind their good wishes and the organization folded in late April.

TAA's then-president Rolf Wolfsburg explains that the study "was trying to point out all the hazards of daytime and to warn advertisers to take those things into account when making their buys." TAA's daytime project attracted the support of Campbell Soup Co., Ralston Purina, Thomas J. Lipton, General Foods and Polaroid.

TAA found that during a typical commercial break in daytime, nearly 36% of the audience is out of the room, and that an even higher proportion leaves the room during between-program commercials. TAA concluded that advertisers could take action about this loss of commercial exposure by targeting consumers based on TAA's program impact scores, which could predict which programs viewers were more likely to stay and watch during commercial breaks.

With daytime soap operas, for example, which account for almost two-thirds of daytime viewing by women 18-24, *Days of Ours Lives* and *The Guiding Light* were high scorers on TAA's index. In the game show category, popular among older viewers, *Jeopardy* was the highest-rated game show on TAA's index.

Despite the discouraging findings on the daytime audience, Wolfsburg is not willing to totally write off the daypart. "For a special group of advertisers, daytime is still a relevant daypart for them," he says.

Just how worried daytime advertisers are about all of these trends will be known this summer. At press time, media departments were hard at work on the daytime problem. DMB&B's Moore flatly says, "Our daytime spending is going to be down."

Some daytime advertisers had already done radical surgery on daytime. Sears Roebuck pulled daytime budgets for its 100th anniversary and put the order into prime time. While few advertisers have made such dramatic moves, many, however, have been gradually chipping away at their daytime budgets and throwing more money into prime time, late night network, cable, magazines, as well as sales promotion.

Other marketers are simply changing the target audience, points out David Lerner, vice president broadcast supervisor, Foote, Cone & Belding, an agency which buys daytime for Clorox, Levi's and California Raisins. "Men have input and do a fair amount of the shopping, so marketers tend to want a dual audience of prime time and late night tv," he adds. "Nobody has totally abandoned daytime," he continues, "but they have switched money into other areas like late night which has a 50-50 female/male audience ratio, a good audience composition for a lot of clients," he continues.

NBC's* Days of Our Lives *and* Another World *hang in.

Kraft's Powell intones that for some brands, like Cracker Barrel cheese, "the male presence is factored into the media plan. But the male presence is not very heavy in the purchase of mayonnaise or margarine," he explains.

While it is impossible to measure just how much other media have benefited at daytime tv's expense, there is no question that marketers are looking more carefully at the media mix because of the working women factor. Independent television, syndication and cable, marketers agree, can deliver pretty strong numbers of working women. Cable television has certainly gained from daytime's woes, says Rick Busciglio, director of sales for CBN. "A number of budgets that we've been getting over the past year or so seem to be coming from the network daytime pool," he notes.

"Planners who were running 60 points a week in daytime in 1978, may now be only running 45 or 50 and diverting some money to cable or late night television," he finds. "And obviously, there are more of us out there saying, look at what we can do, give you billboards, all kinds of little sponsorships, in addition to what you're doing in daytime, at a far better CPM," explains Busciglio. CBN, however, does not try to sell itself in place of daytime, but in combination with broadcast.

Meanwhile, one somewhat surprising print vehicle seems to be picking up some daytime dollars from the likes of Procter & Gamble, Colgate Palmolive, Nabisco, S.C. Johnson, Kraft Foods and Campbell Soups. The revamped *National Enquirer* has carried pages from this crew in the last several years, and has seen its page count climb from 250 pages in 1983 to 354 pages in 1985. But publisher Jim Martise insists the magazine is not trying to compete with network tv.

Rather, the *National Enquirer* reader tends to be a young, high-school educated woman, an increasingly difficult target to reach. "Everybody's audience these days is the professional managerial woman who has graduated from college," tells Martise, "and that's not the *Enquirer*'s market. If you're selling Cadillacs, we might not be your prospect, but if you're selling detergents and sliced cheese, canned soups, household products, aspirin, that is who we deliver," he notes.

Sound a little like daytime television's territory? ■

COVER STORY

by Rebecca Fannin

WHO'S TAKING

Suddenly, the formerly friendly ice cream market has been turned into

AAH . . . the names conjure up such sweet images: Dastardly Mash, Heath Bar Crunch and Vanilla Super Chocolate Chunk. But sweetness and light have nothing whatsoever to do with the business of selling ice cream these days. Take a closer look and note the knock-out punches being thrown by some of the biggest companies in the U.S.

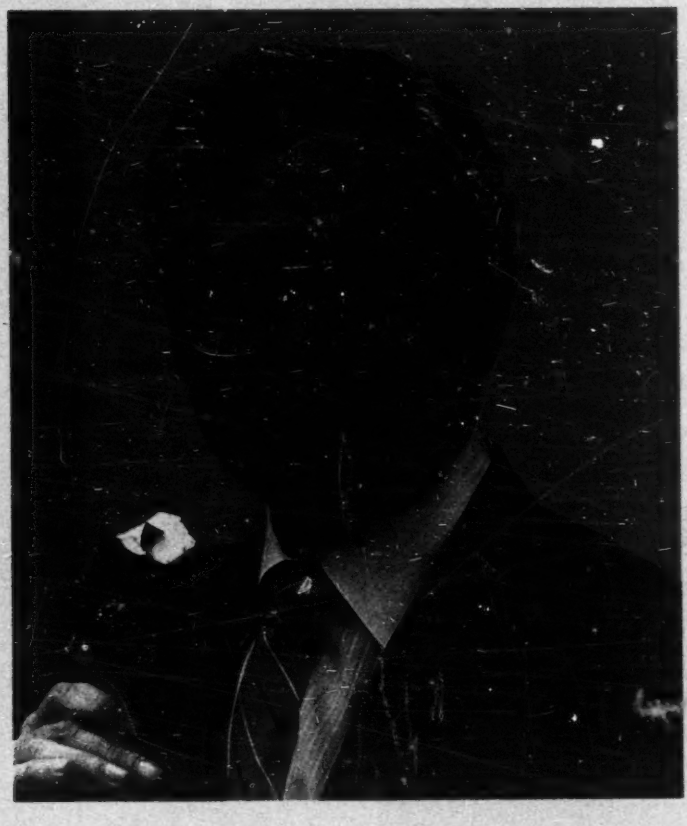
Haagen-Dazs, for instance, the ice cream with the pseudo-Scandinavian name that is made in America by the Pillsbury Co., takes its role most seriously. Last year, Haagen-Dazs got into an ugly distribution squabble with Vermont's tiny upstart Ben & Jerry's. The dispute was eventually settled out of court. Meanwhile, dozens of new and old ice cream companies are finding their existence threatened as they battle for freezer space and recognition in a market increasingly dominated by flashy marketing techniques and image campaigns.

What's going on? Today's work-out and then pig-out generation has turned ice cream into far more than a commodity. This group's growing appetite for ice creams with natural ingredients and plenty of butterfat has created a fast-growing luxury tier in the market. So-called super-premium ice creams, like Haagen-Dazs, Frusen Gladje, Ben & Jerry's and Steve's have seen sales balloon by nearly a six-fold increase while the total market has lagged at a 5% growth rate.

Those with a craving don't mind paying for it. Haagen-Dazs, the creator and leader of luxury ice cream, retails at about $2 a pint. Chunky and chocolately Dove Bars cost $2, gold-packaged pints of Godiva ice cream fetch $3.75 and Mousse du Jour, which combines frozen mousse and super-pre-

A LICKING?

a high-stakes marketing struggle.



PHOTOGRAPHS BY DAVID GAHR

Mark Stevens, new president at Haagen-Dazs, is ushering in an era of novel products and a first — advertising.

mium ice cream brings $2.69 a pint. "Eating ice cream has become hedonistic," explains Robert Ference, managing director of MCA Research. "People looking for self-gratification want something that won't cost much but will still be an indulgence."

But this hunger is causing a meltdown at the freezer case. In the metropolitan New York area alone, there are some 22 luxury brands of ice cream, all fighting costly battles for shelf space. Only the strongest are likely to survive. In today's world, that translates into the support of a deep-pocketed parent to finance stout distribution networks, lavish promotions and advertising. It also doesn't hurt to have a cult following.

Those without at least two of these credentials are already taking a licking. Brooklyn's small six-year-old, super-premium brand, Alpen Zauber, made by Gold Seal Rivera Corp., couldn't offer volume discounts and has virtually disappeared from big supermarkets. Pepperidge Farm's fine heritage in cookies didn't translate successfully into a test of a super-premium ice cream. The category's second largest producer, Borden Inc., pulled out when it couldn't build national sales quickly enough for gelato, a rich Italian type of ice cream that is catching on among experiment-minded. And Tofu Brands Inc., the maker of the ice cream alternative, Tofutti, is being beaten back for having too many calories and too much competition.

There will be others that can't take the heat. Grocers can barely jam in another flavor, and still nearly all the major players are trying to get coast-to-coast distribution. "The last thing supermarket ice cream buyers want to hear is that there is another super-premium on the market," laments Mike Brandt, marketing director for New England's largest ice cream producer, H.P. Hood. That company had to yank Strassels, its super-premium ice cream, from supermarket freezer cases last

year after better-monied brands began to lick away at its sales.

These factors are not deterring the major marketers like Pillsbury and Dart & Kraft, Inc. (the nation's largest ice cream producer). In their quest to be the first national ice cream sellers, both are flexing their marketing and advertising muscles: Kraft is unleashing a torrent of coupons, trade allowance deals and merchandising ploys, as well as a consumer ad campaign, to win it more shelf room and knock off competitors. Since it purchased Frusen Gladje in 1985, Kraft has tripled the brand's sales to $20 million and begun a $5 million ad campaign in an industry where, previously, a nickel was a lot for promotion.

Haagen-Dazs too is rolling up its shirt sleeves and getting down to business. After breezing to $130 million in sales, or 40% of the super-premium market, without springing for a single ad, the company is changing tactics. The brand recently stepped out into a host of consumer magazines, if not the sun and fun commercials of television.

"We are planning to become much more active on the advertising front," relates Mark Stevens, president of the Haagen-Dazs Company, Inc. "But we don't want to over-commercialize the product. We have a delicate relationship with our consumer," he adds.

Indeed a competitor, Schraft's Ice Cream Ltd., found that Haagen-Dazs has a certain mystique. "We found through focus groups that a lot of people feel that each little container was strapped into a seat of a Boeing 727 and imported from Denmark," jokes John LeSauvage, president and chief executive officer. The old New York brand tried unsuccessfully to attack Haagen-Dazs with a series of ads citing a *Consumer Reports* taste test that placed them first and Haagen-Dazs 14th.

Frusen Gladje is playing catch-up.

The era of brands that only define themselves in reference to Haagen-Dazs, however, may be coming to an end.

"I'm surprised at how wide open this market is. Frusen Gladje wasn't a factor five years ago; neither was Steve's or Ben & Jerry's. And they all seem to be doing well," admits Stevens.

Folksy-sounding Ben & Jerry's, with $9.5 million in sales, is seducing urban dwellers with Heath Bar Crunch and White Russian, flavors that make Haagen-Dazs' chocolate chocolate chip and swiss vanilla almond seem out-of-date. Lines have been forming, too, outside Steve's 47 dip stores, which pioneered the mixing of fruits, nuts and candies into every scoop for flavors like Kahlua Amaretto Almondine and Praline Perfect Parfait.

While the 342 Haagen-Dazs franchises have looked on, Steve's approximately $12 million business has begun edging its way into supermarkets. "Haagen-Dazs has gotten old after 25 years," sneers Richard Smith, chairman of Steve's Homemade Ice Cream, Inc, and the founder of Frusen Gladje. "The new approach of Steve's is the thing people are looking for," he says.

Hardly, responds Haagen-Dazs' Stevens. "We have been an industry phenomenon for many years. We don't see Haagen-Dazs as being in the super-premium market; it competes in the ice cream market. Others have defined a super-premium market to imitate us."

Haagen-Dazs is not above some fancy imitating of its own. Mindful of the impact the chocolate-enrobed Dove Bar made last year (pushcart sales and retail outlets brought in $7 million in sales in 1985), Haagen-Dazs has come out with its own version. Though smaller and less costly ($1 to $1.25), Haagen-Dazs' ice cream bars boast real Belgian chocolate in milk and dark varieties and a classy cardboard container. The item is already available in all kinds of retail outlets from supermarkets to bodegas. Stevens promises more new product ideas by the fall, most likely other novelties and more flavors. "More people are looking to us as a leader in innovation," he says. "And we are looking at a number of new product ideas, some that will be ready in four to five months."

But new competitors are coming thick and fast, each with a new twist on an old taste treat. Due out this summer is the 89-to-99-cent Dove Delight, a portable ice cream sundae in a hockey puck shape. One such treat combines a crispy wafer, a big dose of fresh raspberry sauce and a small amount of ice cream, all surrounded by chocolate. Chipwich, which made its name with an ice cream cookie sandwich, is spending $500,000 for radio in the New York area this summer for its latest — Love Bites, small chocolate-covered ice cream treats that will have four to a box and sell for $1.75. "It'll be one of my typical blitzes," says chairman Richard LaMotta. "We'll have cherubs on the street vendors' uniforms and we'll be giving away prizes like Club Med trips, Dom Perignon and a trip on the Orient Express."

"The entry of these new brands and

Richard Smith sold Frusen Gladje last year to Dart & Kraft, Inc., then turned around and bought Steve's, a dip store operation. Now, he's packing Steve's for pint sales at supermarkets.

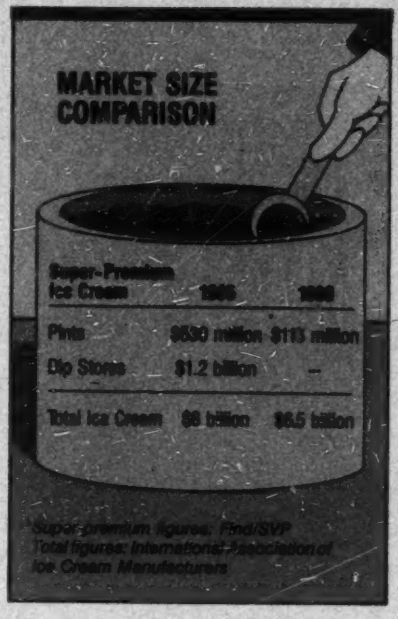
new competitors, particularly against our pint size, are clearly challenging us," admits president Stevens. "It's a major daily problem of whether we have lost any space. But so far, any that we have lost has been offset by other gains," he adds.

Haagen-Dazs is also in a state of transition. For 65 years, the New Jersey-based company made a living as a family-owned ice cream enterprise. In 1960, founder Reuben Mattus decided to put the company's fortunes into the making of top-of-the-line ice cream. With its reputation growing through supermarket distribution and franchised dip stores, the Mattus family sold out to Pillsbury in 1983. Though some family members stayed on for a while, the big change occurred last year as Stevens was recruited to take on the presidency.

In his 45 years, Stevens has made quite a reputation for himself. In 1977, he founded Sunkist Soft Drinks, which he built into a $500 million business. A savvy marketer, Stevens is pushing Haagen-Dazs into advertising.

"We're advertising because we want a unified image that word-of-mouth can't give," explains Stevens. "We also realize that one-third of ice cream eaters have never heard of Haagen-Dazs. While the awareness is high in New York, this is a national problem," says Stevens.

To further its national goals, the company has undertaken its first print campaign. Haagen-Dazs appeared in the yearend specials of *People* and *Life*, then in the December and January issues of a select list, like *Connoisseur*, *Bon Appetit*, *Gourmet*, *Chocolatier*, *Food and Wine*. Newsweeklies were added for reach.



"We wanted to choose the right environment for an elegant, upscale, high image product," says Beth Brauner, director of marketing. In keeping with the brand's image, Haagen-Dazs ads use snob appeal and subtle humor. The message is that a proper diet can't be maintained without the four basic food groups: caviar, brioche, artichokes and Haagen-Dazs. "The ads are consistent and sophisticated in their humor," she adds.

But they are unusual too. "We are using a non-packaged goods approach to the advertising as though it weren't just ice cream, but an indulgence like a Mercedes or jewelry," points out Steve Hurwitz, group director at McCann-Erickson Inc. "We are advertising to a very select group by design. Our long-range plan is to enhance the brand on a very, very careful scale. It's not as though we are going to blast out on television."

Haagen-Dazs has stepped up the pace, however. This month, the same magazines will be graced with chocolatey-rich ads for the new Haagen-Dazs bar. In July, Haagen-Dazs plans to use magazines to promote some new flavors like cappuccino, rounding out its 23-flavor line.

If Haagen-Dazs is just starting to rev its engines, Kraft is in high gear. Kraft fields entries in all levels of the ice cream market and besides Frusen Gladje, is pushing hard for Breyers, the nation's favorite, Sealtest, the leading economy brand, and Light n' Lively, the No. 1 ice milk.

Kraft has been particularly busy price-promoting Breyers, a premium brand with more air and less butterfat than super-premiums. The all-natural ingredients of Breyers are touted in a year-old tv campaign handled by Young & Rubicam. Last year, Breyers grew at a double-digit rate and the plans are to expand its distribution into nine western states this year. "We have an excellent product and we believe that there's a lot of potential in under-developed areas west of the Mississippi," says Robert Baker, director of marketing for frozen dessert products at the Kraft Dairy Group. To make the move, Breyers' white containers were dressed up in black by Gerstman & Meyers Inc. to look contemporary and stand out against the rainbow of colors in the freezer case.

"Those brands that aren't continually supported or that aren't that unique or different will not get the kind of turnover that they need at the supermarket," says Baker at Kraft.

In its catch-up game to Haagen-Dazs, Frusen Gladje's advertising, high-tech packaging and merchandising have, of necessity, been breakthrough. "Our advertising is the first that acknowledges the consumer insight that eating ice cream means blowing the diet but recognizes the thinking that it's so wonderful that they'd do it

LEIF SKOOGFORS

Robert Baker, director of marketing for frozen desserts at Kraft, takes a break from marketing warfare.

Ben Cohen and Jerry Greenfield, co-founders of Ben & Jerry's, use wholesome values to sell ice cream.

again," articulates Judith Bowen, product manager. Seconds Dennis Fogarty, senior vice president and management supervisor at Geers Gross: "We said 'Let's break all the rules.' So what we did is eavesdrop on one person so that it's seen that something special goes on when you eat ice cream. You spend a little time with it and you eat it in your favorite bowl." The ads run in early morning, late night and during prime on spot tv, around programs such as the *Today* show, *Johnny Carson* and *Cheers*. A print campaign appears in the *New York Times*, and a number of upscale and regional magazines. A new $5 million campaign for a new sorbet line has just broken as well.

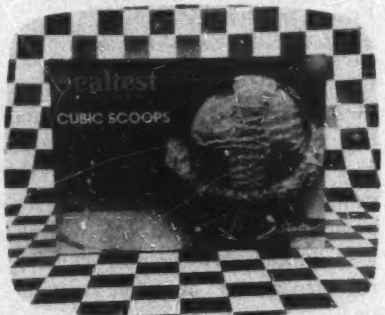
A similarly ambitious sales promotion strategy supports Frusen Gladje. Haagen-Dazs can rarely be found "on special," but Frusen Gladje regularly distributes 25-cents-off coupons through newspapers in selected markets to get trial.

Haagen-Dazs' Stevens looks down his nose at such efforts. He does not believe that price promoting is the way to win the game. "We are not in a price war, we are in a quality war," he says.

But Frusen Gladje is relentless. For instance, when the brand was performing poorly in the Piggly-Wiggly supermarkets in the Memphis area, the buyers issued an ultimatum to Frusen Gladje to either get the brand to move, or it would be tossed out. "The problem was that most people in the Memphis area had never heard of Haagen-Dazs or Frusen Gladje," tells Jim Unsell, an ice cream buyer for the chain. "But Kraft came back with an in-store sampling program, they increased their promotional allowances and scheduled two coupons in free-standing inserts." Sales have doubled for the brand since the fall, but Unsell plans to keep an eye on how well Frusen Gladje sells over the summer.

Because the stakes have gotten so high, even for the majors, the smaller, quirky brands are taking a different tack. "Our marketing image is very different from the brands that say their ice creams are from Europe," says Ben Cohen, president of Ben & Jerry's. "We're honest, down-home, funky, fun and happy, as opposed to elegant," he notes of the brand that has an appeal among the reformed hippie generation. Instead of being decorated with a Scandinavian map, Ben & Jerry's pictures the wholesome and bushy-haired owners, Cohen and Jerry Greenfield, the two high-school buddies from Long Island who started the company in 1978.

From a New England stronghold, Ben & Jerry's is gaining a footing in New York and throughout the Middle Atlantic region. With both pint sales at supermarkets and 15 franchises, it is poised for a major move West by the end of the summer, says Cohen. (The company raised nearly $2 million to finance expansion when it went public last year.) Cohen is allocating 4% of sales (or about $400,000 currently) to an advertising campaign. Mostly the ads are used to introduce the brand to markets via 10-second spots on late-night tv, and outdoor advertising.



Sealtest's neat little squares win many fans.

Ben & Jerry's also gets a lot of mileage from public relations antics. For instance, it mocked Pillsbury's efforts to cut off its distribution with flyers, posters and ice cream containers imprinted with the question, "What's the Doughboy afraid of?"

The progress of Ben & Jerry's has inspired lots of other regional companies to take bolder actions. Steve's, for example, has been bought by ice cream entrepreneur Richard Smith. Steve's flavors are very similar to its Vermont cousin, but it has an edge in distribution. Smith is also the chairman and CEO of Calip Dairies and T&W Suffolk, the New York tri-state area's largest distributors of ice cream.

Meanwhile, the West Coast's most popular brand, Dreyer's (or Edy's, as it's called in the East to avoid confusion with Breyer's) is blazing a trail from Chicago through to the Middle Atlantic states. "We believe in consumer pull," says John A. Sommerville, director of marketing, Edy's is packing a strong marketing program for its East Coast move. For instance, in the Baltimore/Washington D.C. area, a seven-month tv advertising campaign of 60-second spots is being run at a national spending rate of $20 million. Additionally, 4.5 million coupons were distributed through direct mail and free-standing inserts.

Most grocers had not planned for the sudden burst in popularity for designer-like ice creams. Now the difficult decisions are being made. "The ice cream category is extremely tight. We review the movement of brands on a constant basis so that we can maximize our profit potential," says Terry List, an ice cream buyer for the Jewel Food Stores. "And we still need to carry brands that are at the economy price level and a step above that." In its survey of 100 independent grocers,

Find/SVP, an information clearinghouse, reports that only 9% replaced one super-premium for another. But 40% removed an ice cream at a different price level, 18% displaced an in ice cream novelty product and 15% just shoved the products a little tighter.

Perhaps grocers wished they would have planned a little better. Ice cream is bought by more households than any other item in the frozen food aisle. And ice cream is the third most profitable item after orange juice and premium-priced tv dinners.

With the economy improving and consumers' growing appetite for higher-quality ice creams, the ice cream market is bound to grow even tighter. Only those that can learn and afford advertising and promotion are likely to survive the coming shakeout. "I can't say who's going to survive. But no one has caught up with Haagen-Dazs," says Stevens. Then, the recently appointed president warns his rivals: "Watch our smoke. Over the next five years, Haagen-Dazs is going to become more exciting, more interesting and better." And, apparently, a lot more visible. ■

PUTTING THE FREEZE ON FRUIT

Remember those frozen ice pops mom fed you after a hard day's play? Well, now they're for adults too. These good-for-you treats are no longer just sugary ices, but fruit-packed delights that even weight watchers can nibble on.

Last year, $150 million was spent on fruit bars. And the field is becoming crowded as several big brand names try to bore into this new segment within the adult frozen novelty market.

Frozen fruit bars took off last year with the advent of Dole. That company, whose name is nearly synonymous with fruit, was approached with the idea for the product in early 1982 by the Southland Corp. operator of the 7-Eleven chain. Nine months later, during the summer of 1983, the Castle & Cooke, Inc. brand entered tests. It is priced at $1.89 to $1.99 for four to a box. "We thought there would be more pricing sensitivity, because this is higher-priced than many other frozen novelties," notes Tama Greenberg, director of marketing. "But it's not just sugary water. We've created a category for premium frozen novelties."

Dole's fruit bar went national last summer, helped by a joint venture with Southland to market and distribute the product. A fruit 'n cream bar rolled nationally in spring.

Dole has wrapped up more than half of the fruit bar category with a $40 million network tv, radio and print campaign that relates how the fruit bars "are a refreshing way to eat fruit." The campaign, running this summer, is handled by William Esty.

The latest national entrant to this booming market is another brand name better known for bananas. United Brands Co. and its newly created Chiquita Brands division is launching a series of products to transform itself from a commodities to a packaged good business. "We want to have an entire freezer case door that has Chiquita on it," says Burt Rubin, vice president and general manager of the consumer package good division. Chiquita Pops, priced from $1.99 to $2.79 for eight to a box, went national in April, after test-

Frozen fruit-based pops are for adults as well as kids.

ing last summer in Atlanta, Denver, Philadelphia and Phoenix. A $28 million network tv and consumer magazine campaign by Ammirati & Puris positions Chiquita Pops as an appropriate adult snack that kids will also love. Promotional support, including, newspaper and magazine coupons, free-standing inserts and in-store sampling, was done during the spring.

Popsicle Industries, Inc. joined the pack this spring by introducing into test market, Fruitsicle Smooth n' Fruity bars, positioned against both adults and children. The Popsicle bar is in the 1 3/4 ounce size, smaller than competitors and with only 50 calories. They're priced at $2.65 for twelve to a box.

A tv campaign handled by Dancer Fitzgerald Sample is airing during daytime and prime time. In addition, coupons are running in newspaper food sections and free-standing inserts.

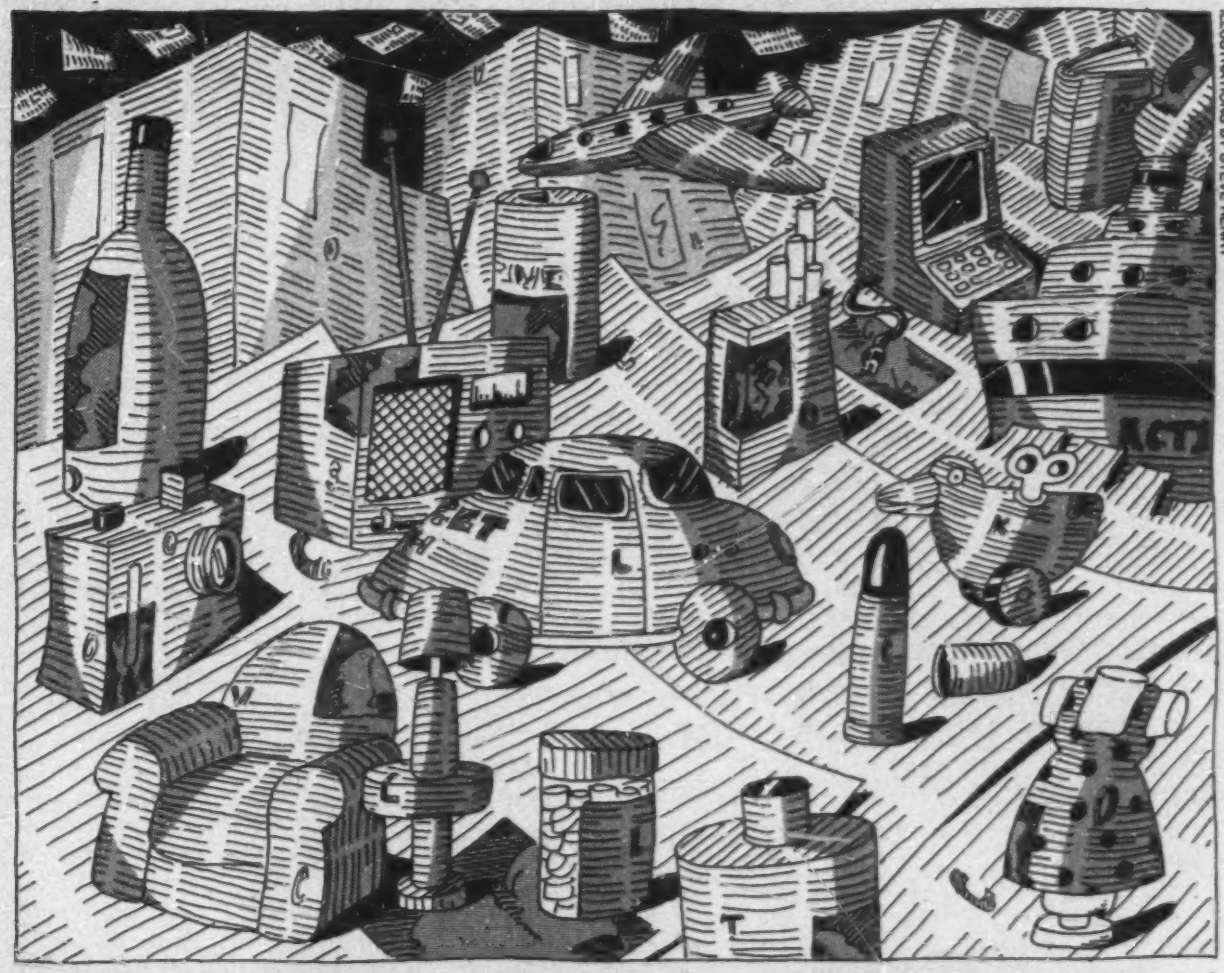
General Foods is on the list of interested parties, too. Having created the $110 million pudding pop market, the company is testing Fruit 'n Cream in Salt Lake City and Boise, Idaho.

Frozfruit Corp., which has been selling fruit bars for seven years, is seeking to defend its position against these big-name brands by calling itself the gourmet frozen fruit bar. Frozfruit charges 89 cents for a four-ounce bar with chunks of fruit but only 68 calories for most of the flavors. "Yuppies are the type who would like it," says Charles O'Brien, Frozfruit's vice president of marketing. "These people will have a banana bar at breakfast because they can eat it in the car," he points out. Frozfruit gets these young urban dwellers after a hard work-out too through distribution in health clubs.

Frozfruit has built a 10% share with good distribution in coastal markets through radio spots from Drossman Lehman Marino and mouth-watering point-of-display. "We're going to be okay. There is always room for a best," says O'Brien. "Some people are buying 50 of these bars every week."

Rebecca Fannin

SPECIAL REPORT

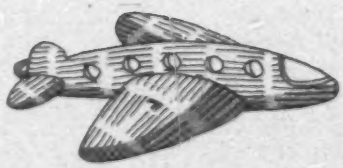


ILLUSTRATIONS BY STEVE HENRY

1985 BRAND LEADERS IN NEWSPAPERS

This isn't one of those years where spending records basically tell the whole story about newspapers. By far the biggest and most urgent self-assessment in the medium's history is lifting the spirits of publishers and closing the gaps between papers. Spending tables on the pages that follow show the tangible, outward vital signs of the medium's health. More telling in coming months — and certainly key to convincing advertisers to spend more in newspapers — may be the new service spirit of newspapers.

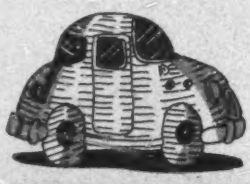
It's hoped that innovative thinking will speed up the pace of national ad investments in newspapers. The estimated U.S. national advertising investment in newspapers reported by the Newspaper Advertising Bureau for 1985 is $3,352,128,000 compared to



$3,081,000,000 for 1984 — an 8.8% increase.

Media Records, which bases its figures on 202 measured daily and Sunday newspapers, points out that their category totals (pages 70 and 72) will not coincide with U.S. totals because U.S. totals reflect earned discount rates, including preprints and zoned advertising. The category totals reflect advertising converted to dollars at the one-time open-inch rate.

National advertisers began to have hopes of complete standardization in newspapers in 1984, when the industry ended the chaos of over 400 ad formats measured by linage by instituting one standard column format measured in inches (approximately 2 1/16" wide). Use of standard advertising units (SAU) is now virtually industrywide. Another long-awaited innovation, satellite transmission of ad copy (AD/SAT), starts a test period this fall in 12 papers under the sponsorship of Britain's biggest commercial and newspaper printer, The Pergamon Press.



The biggest and best news is that newspapers are becoming more flexible in their stances toward the national advertiser. Faced with a declining share of the national ad pool, key newspaper executives convened in April 1985 and decided to face up to problems national advertisers have cited for years. The result, a 10-member task force committee called The Future of Advertising, has already oiled some sticky wheels.

By the annual convention of the American Newspaper Publishers Association (ANPA) this past April, the committee had produced a manual on readership and a guide to quality color reproduction. One task force is bringing the medium closer to standardizing everything from ad contract language to the classifications in the classified section.

Another task force is working to challenge such market competitors as direct mail by making greater use of newspaper circulation lists and delivery systems. Standard rate breaks, an industrywide discount structure, an innovative set of guaranteed national positions (for more, see "Print Beat," page 17), getting newspapers onto major expenditure listings and standards for audience demographics are but a few of the other changes being considered.

In the end, the new hope of newspapers is that the following charts will be filled with big pluses for years to come.

Introduction: Fred Pfaff
Project editor: Patrick Kelly

NEWSPAPER AUTOMOTIVE DOLLARS: WHERE THEY COME FROM

Rank	Brand	1985 Newspaper investment	Total (100%) Trucks, pick-ups campers	Total (100%) Auto	Percent of auto total (100%) from: Factory	Dealer assns.	Local dealers
1.	Chevrolet	$50,966,000	9%	91%	19%	8%	73%
2.	Ford	47,733,000	9	91	21	20	59
3.	Cadillac	31,209,000	0	100	4	10	86
4.	Chrysler	22,863,000	1	99	32	4	64
5.	Toyota	21,647,000	17	83	17	2	81
6.	Buick	20,389,000	1	99	10	24	66
7.	Oldsmobile	19,445,000	0	100	8	19	73
8.	Lincoln	19,150,000	0	100	14	27	59
9.	Mercedes-Benz	17,877,000	1	99	67	1	32
10.	Nissan/Datsun	16,381,000	20	80	12	13	75
11.	Dodge	15,495,000	9	91	8	11	81
12.	Pontiac	10,097,000	0	100	11	7	82
13.	Honda	9,083,000	1	99	10	7	83
14.	Volvo	8,970,000	1	99	60	8	32
15.	Jaguar	8,810,000	0	100	52	13	35
16.	BMW	6,984,000	0	100	36	24	40
17.	Mercury	5,842,000	0	100	38	19	43
18.	Volkswagen	5,573,000	2	98	37	18	45
19.	Mitsubishi	5,479,000	15	85	10	21	69
20.	Saab	5,285,000	1	99	75	8	17
21.	Mazda	5,036,000	9	91	23	9	68
22.	American	5,025,000	3	97	4	17	79
23.	Suburu	4,321,000	0	100	17	11	72
24.	Audi	4,194,000	0	100	36	26	38
25.	Isuzu	3,192,000	47	53	36	8	56

Source: Media Records/M&MD

AUTOMOBILES

Automobile newspaper advertising rankings in 1985 (factory + dealer associations + local dealers) among the top three passenger cars remained the same as in 1984.

Chevrolet, in the number-one spot, increased its outlay 32% to reach $46.6 million; the 1984's increase was 61%. There was a shift in the source of these dollars with more (19% against 12%) coming from the factory. Dealer association contributions accounted for 8%; local dealers dropped to 73%.

Ford, with $43.6 million, was up 40% over 1984's $31.2 million. Its 1984 increase was a modest 8%. As with Chevrolet, more Ford dollars came from the factory (21% against 14%); the big dip was in the local dealer contribution — from 65% to 59%.

Cadillac, as it has been for the past three years, holds the third position which used to belong to the Chrysler brand. Chrysler, by the way, upped its investment in 1985 by 47% — from $15.5 million to $22.9 million, moving into fourth place.

Extraordinary increases were reported for other makes among the top 20. A sampling of those with increases of 50% or better include: Toyota — 67%; Mercedes-Benz — 177%; Volvo — 60%; Mitsubishi — 99%. In this same group only three makes showed 1985 totals below 1984. These were Volkswagen — off 27%; Mercury —

off 8%; Dodge — off 13%.

Beyond the top three, the rankings of the passenger cars, in order, show: Chrysler, Buick, Oldsmobile, Lincoln, Toyota, Mercedes-Benz, and Dodge in tenth position.

AIRLINES

Domestic carriers: Airline data are presented for both domestic and foreign carriers. The domestic carriers' investment data include expenditures for both domestic and international destinations where applicable.

People Express continued its upward enthusiasm for national newspapers in 1985. People entered the calculations in 1981 with an outlay of $1.4 million. Each year since then there has been a substantial increase with the big jump showing in 1984 (up 310% over 1983). This was followed in 1985 with an increase of 190%, reaching a total of $26 million (and the number-one spot) in search of both domestic and foreign destination business.

Eastern, after a 1984 decrease of 17%, increased its 1985 investment by 33% over 1984, reaching a total of $24.8 million and the second position. Pan American reversed a two-year downward trend, showing an increase of 82% to $20.9 million and the third spot.

Delta, with $17 million in 1985, dropped to sixth place from the number-one spot in 1984. Eastern moved up one position in 1985; TWA, second in 1984, dropped to fourth in 1985. American's $19.3 million in 1985 was an increase of 46%; United almost doubled its 1984 outlay — from $6 million to $11.7 million, an increase of 93%. Northwest Orient showed an increase of 63% — from $10.3 million to $16.8 million.

Foreign carriers/cargo: Among the foreign carriers the top three are British, Scandinavian and KLM Dutch. Of these leaders, only British was a repeat from 1984 with an investment of $3.7 million, up but 1%. Scandinavian, now second but sixth in 1984, reached $2.9 million, an increase of 52%. KLM Dutch moved into the third position from seventh in 1984. Its total of $2.4 million was up 43% over the previous year.

Four of the top ten in 1985 showed decreases from 1984. The top three total in 1985 was up 24% over 1984. However, the top three in 1984 invested 16% more than their counterparts in 1985.

Federal Express returns in the top spot among the cargo carriers in 1985, but its investment of $3.3 million was off 9%. United Parcel, out of the medium in 1984, came back with $900,000 and the second spot. DHL took over the third position with an outlay of $374,000 against $10,000 in 1984.

Purolator, number two in 1984, did not show in 1985; Quick International followed a $97,000 budget in 1984 with only $69,000 in 1985.

CIGARETTES

This year's report identifies 33 brands traceable to one of the six major manufacturers. The total newspaper investment for these six sources was $181.7 million, off 6% from 1984's $193.3 million.

The rank order of investment was Reynolds — 10 brands — $68.3 million — 37% of total; Philip Morris —

Where Do Upscale Products Meet An Upwardly Mobile Audience?

The Schenectady Gazette delivers the young reader with a high income. In fact, nearly half our readers, some 71,000 strong, have a household income of $25,000+ and an even higher number are between the ages of 25 and 54.
That's buying power, especially when you consider that we serve an area that has one of the lowest costs of living of any major market.
It's the right media to the right market. Just one of the reasons the Schenectady Gazette is distinctly different.

schenectady
Gazette
Distinctly Different

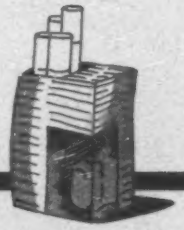
Represented by C.W.O. & O. Schenectady, N.Y. 12301 SOURCE: Fact Finders 1984 SMSA Study

seven brands — $61.4 million — 34% of total; Brown & Williamson — six brands — $27.3 million — 15% of total; Lorillard — four brands — $13.9 million — 8% of total; American — three brands — $7.2 million — 4% of total; and Liggett & Myers (Grandmet) — three brands — $3.7 million — 2% of total.

Reynolds, while leading the pack, was off 16% from 1984's total outlay of $81.4. Philip Morris was off 5% from its investment of $64.6 million in 1984. Brown & Williamson ran about even with $27+ million in both years. Lorillard was up 12% from $12.4 million. American, which had been lagging in newspaper activity, upped its three-brand outlay by 188% from $2.5 million, due to a resurgence in activity in support of Parliament — $4.7 million in 1985 against zero in 1984 and half a million in 1983. Data for 1982 showed $2.5 million. At the low end is Liggett & Myers, off 30%.

Individual brand activity remains as volatile as ever. The first five brands from 1984 remain in the top 20 (see accompanying table) but, for example, Merit, last year's number-two brand, is now in the 19th position.

Marlboro (Philip Morris) again holds the number-one ranking among all cigarette brands. Its 1985 newspaper outlay, however, is slightly off from 1984 — $29.1 million against $29.3 million. But each year is more than double 1983's $11.1 million.

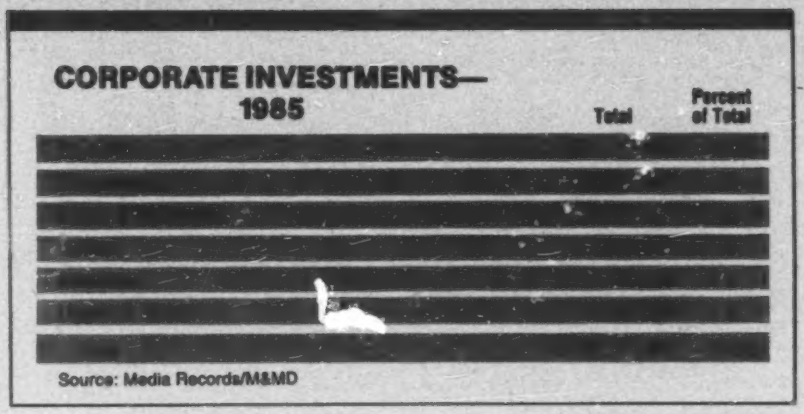


Richland (Brown & Williamson) rose to the number-two spot in 1985 with $16.4 million. For the first two years of its newspaper ad history, it held the 19th spot with but $2+ million in national newspaper advertising.

Looking back over other recent introductions, Richland's activity in newspapers was unusual. Other recent entries had tens of millions behind the brand in newspapers in the inaugural year. To wit: Sterling-RJR-(1984) — $10.6 million; Century-RJR-(1983) — $14.5 million. Eve (Liggett & Myers) came on the newspaper scene in 1984 with a $4.4 million newspaper backing, but dropped to the 25th spot in the second year with $1.2 million.

Another cigarette brand with an unusual spending pattern in national newspapers was Player's, a 1983 introduction from Philip Morris. In its first year, the brand was supported by almost $24 million; then nothing in 1984; and back up to $7.5 million in 1985.

Third spot in 1985 went to Reynolds' More with $14.7 million, up 37% over 1984.



Source: Media Records/M&MD

TOP 20 CIGARETTE BRANDS' EXPENDITURES IN NEWSPAPERS

1985 Rank	Brand	Mfr.	1985 Investment	1984 Investment	1984 Rank	1983 Investment
1.	Marlboro	PM	$29,064,000	$29,328,000	1	$11,062,000
2.	Richland	B&W	16,356,000	2,058,000	19	2,222,000
3.	More	RJR	14,701,000	10,651,000	7	13,536,000
4.	Virginia Slims	PM	13,793,000	4,127,000	17	4,241,000
5.	Winston	RJR	10,843,000	8,683,000	10	12,108,000
6.	Now	RJR	10,177,000	7,503,000	12	8,415,000
7.	Century	RJR	9,850,000	16,341,000	5	14,472,000
8.	Players	PM	7,498,000	–	–	23,944,000
9.	Benson & Hedges	PM	6,742,000	13,296,000	6	8,127,000
10.	Kool	B&W	6,088,000	17,574,000	4	11,031,000
11.	True	Lor	5,783,000	5,528,000	14	3,838,000
12.	Vantage	RJR	5,550,000	17,754,000	3	10,953,000
13.	Newport	Lor	5,387,000	1,244,000	–	469,000
14.	Sterling	RJR	5,053,000	10,556,000	9	–
15.	Parliament	Amer	4,686,000	–	–	516,000
16.	Belair	B&W	4,442,000	984,000	–	153,000
17.	Kent	Lor	2,631,000	5,603,000	13	8,508,000
18.	Camel	RJR	2,471,000	10,640,000	8	13,801,000
19.	Merit	PM	2,422,000	18,809,000	2	9,286,000
20.	Stride	L&M	2,384,000	426,000	–	–
	Top 20		$165,921,000			
	All others		$ 33,913,000			
	Total		$199,834,000			
	Percent of Total		83.0%			

Source: Media Records
Manufacturer code: Amer—American Tobacco; B&W—Brown & Williamson; L&M—Liggett & Myers (Grandmet); Lor—Lorillard; PM—Philip Morris; RJR—Reynolds

LIQUORS

Seagram's is far and away the leader, but it continues its spending pattern of "up and down." This is not a mild undulation; it is an erratic program. In 1985 newspaper volume was off 24%. Previous annual changes going backwards were: +27%, -56% +43%.

In second place was Ballantine's (up from number three in 1984). The newspaper budget was increased 13% to $1.8 million. Johnnie Walker, off slightly from 1984, spent $1.5 million. J&B, second in 1984, was off 78% — from $2.5 million to $553,000. ■

TOP 100 NATIONAL NEWSPAPER ADVERTISERS—1985

Rank	1985 Investments	1984 Investments
1. General Motors Corp.	$140,979,000	$109,359,000
2. Philip Morris Cos.	78,031,000	69,023,000
3. Ford Motor Co.	77,295,000	62,063,000
4. R.J. Reynolds Industries	73,321,000	101,990,000
5. American Telephone & Telegraph Co.	57,210,000	58,200,000
6. Chrysler Corp.	42,000,000	34,962,000
7. International Business Machines	30,610,000	36,036,000
8. People Express Airlines, Inc.	29,212,000	8,953,000
9. B.A.T. Industries (Batus Inc.)	28,425,000	25,317,000
10. Eastern Air Lines, Inc.	24,838,000	18,654,000
11. Pan-American World Airways, Inc.	21,218,000	11,395,000
12. CBS Inc.	20,936,000	21,519,000
13. Trans World Airlines, Inc.	20,870,000	21,436,000
14. Toyota Motor Sales, U.S.A., Inc.	20,761,000	14,913,000
15. United Airlines, Inc.	19,987,000	6,112,000
16. RCA Corp.	19,537,000	36,962,000
17. American Airlines, Inc. (AMR Corp.)	19,534,000	13,496,000
18. Capital Cities/ABC Inc.	18,168,000	16,155,000
19. Mercedes-Benz of North America	18,008,000	6,545,000
20. Delta Air Lines, Inc.	17,116,000	26,331,000
21. Northwest Orient Airlines	16,851,000	10,265,000
22. Nissan Motor Co.	16,504,000	13,170,000
23. U.S. Government	15,826,000	16,797,000
24. NYNEX Corp.	15,133,000	11,781,000
25. Texas Air Corp.	15,075,000	17,636,000
26. American Express Co.	14,864,000	11,481,000
27. Loews Corp.	13,815,000	17,095,000
28. GTE Corp.	13,665,000	11,631,000
29. Time, Inc.	13,592,000	13,319,000
30. Norwegian Caribbean Lines	11,948,000	11,112,000
31. Xerox Corp.	11,351,000	8,595,000
32. Volkswagenwerk AG	10,966,000	11,051,000
33. Liberty Travel, Inc.	10,902,000	7,880,000
34. Ameritech	10,829,000	11,110,000
35. General Electric Co.	10,332,000	14,984,000
36. Honda Motor Co.	10,331,000	9,001,000
37. American Motors Corp.	9,902,000	7,572,000
38. Peugeot Motors of America	9,799,000	3,140,000
39. Volvo North American Corp.	8,970,000	5,599,000
40. Jaguar Cars Inc.	8,810,000	6,353,000
41. United Technologies Corp.	8,807,000	7,283,000
42. Cunard Line Ltd.	8,791,000	9,839,000
43. Beatrice Companies, Inc.	8,773,000	12,340,000
44. Republic Airlines, Inc.	8,352,000	9,165,000
45. Brown-Forman Inc.	8,187,000	4,791,000
46. Apple Computer, Inc.	8,139,000	8,026,000
47. MCI Communication Corp.	7,782,000	3,491,000
48. Pacific Telesis Group	7,706,000	5,142,000
49. Mobil Corp.	7,668,000	6,757,000
50. B.M.W. of North America Inc.	7,594,000	6,109,000

Rank	1985 Investments	1984 Investments
51. Procter & Gamble Co.	$7,345,000	$ 6,547,000
52. Southwestern Bell Corp.	7,286,000	5,798,000
53. Abernathy & Closter Ltd.	7,229,000	2,070,000
54. Grandmet USA, Inc.	7,101,000	12,842,000
55. Seagram Company Ltd.	7,054,000	9,426,000
56. Franklin Mint Corp.	6,960,000	6,654,000
57. Coca-Cola Co.	6,941,000	6,747,000
58. Pleasant Hawaiian Holidays	6,901,000	6,101,000
59. Bell South Corp.	6,820,000	7,260,000
60. Piedmont Aviation, Inc.	6,813,000	5,686,000
61. Royal Caribbean Cruise Line	6,591,000	6,860,000
62. Carnival Cruise Lines	6,506,000	5,129,000
63. USAIR Group, Inc.	6,471,000	6,349,000
64. Dart & Kraft, Inc.	6,433,000	6,919,000
65. Princess Cruises	6,198,000	6,639,000
66. Hyatt Corp.	5,990,000	11,762,000
67. Epson America, Inc.	5,975,000	9,761,000
68. Southwest Airlines Co.	5,953,000	4,109,000
69. PepsiCo, Inc.	5,926,000	5,036,000
70. Club Med, Inc	5,865,000	5,208,000
71. U.S. West, Inc.	5,722,000	4,981,000
72. Hattori Corp. of America	5,638,000	5,181,000
73. Anheuser-Busch Cos.	5,611,000	6,868,000
74. May Department Stores Co.	5,609,000	3,480,000
75. NEC Electronics Inc.	5,551,000	3,952,000
76. Midway Airlines, Inc.	5,529,000	5,365,000
77. Hearst Corp.	5,446,000	3,335,000
78. Mitsubishi International	5,362,000	3,217,000
79. Sitmar Cruises	5,158,000	9,731,000
80. Carlson Companies, Inc.	5,123,000	1,650,000
81. Mazda Motors of America (Central)	5,036,000	3,018,000
82. Frost Co.	4,962,000	3,838,000
83. Saab-Scania of America, Inc.	4,950,000	4,239,000
84. Blue Shield of California	4,792,000	3,053,000
85. Intl. Thomson Organization Ltd.	4,634,000	4,440,000
86. Sundance Cruises	4,621,000	1,468,000
87. Maytag Co.	4,481,000	3,565,000
88. World Airways, Inc.	4,471,000	4,507,000
89. Holland America Line-Westours	4,425,000	6,276,000
90. Carter Hawley Hale Stores, Inc.	4,420,000	2,728,000
91. Bell Atlantic Corp.	4,369,000	6,402,000
92. Doubleday & Company, Inc.	4,342,000	5,263,000
93. Subaru of America, Inc.	4,321,000	4,557,000
94. Armstrong World Industries	4,218,000	1,537,000
95. Alamo Rent A Car	4,195,000	1,175,000
96. Rapid-American Corp.	4,183,000	3,615,000
97. American Brands, Inc.	4,050,000	4,994,000
98. Matsushita Electric Co.	4,046,000	3,217,000
99. Transamerica Corp.	4,040,000	4,014,000
100. Estee Lauder, Inc.	3,447,000	3,301,000
Total top 100 newspaper advertisers		**$1,384,425,908**

TOP BRAND SPENDERS IN NATIONAL NEWSPAPER SPACE

	1985	1984	1983	1982	1981
Air conditioning					
Carrier	$1,712,000	$2,697,000	$1,371,000	$1,474,000	$1,170,000
Bryant	1,130,000	704,000	349,000	309,000	529,000
Friedrich	1,049,000	536,000	748,000	476,000	493,000
Aircraft-equipment					
McDonnell Douglas	711,000	550,000	539,000	263,000	182,000
Grumman	372,000	501,000	227,000	19,000	370,000
Piper	336,000	203,000	171,000	23,000	5,000
Airlines—Domestic carriers					
People Express	26,012,000	8,953,000	2,180,000	1,621,000	1,446,000
Eastern	24,838,000	18,611,000	22,461,000	21,625,000	23,070,000
Pan American	20,900,000	11,464,000	19,093,000	23,634,000	17,166,000
Airlines—Foreign carriers					
British	3,703,000	3,662,000	3,075,000	3,423,000	2,255,000
Scandinavian	2,947,000	1,940,000	2,708,000	1,713,000	167,000
KLM Dutch	2,421,000	1,689,000	1,550,000	1,604,000	1,500,000
Aluminum & paper products					
Pampers	878,000	–	400,000	137,000	66,000
Kleenex	800,000	92,000	448,000	651,000	1,062,000
Luvs	561,000	228,000	417,000	270,000	140,000
Amusements					
Disney	2,225,000	866,000	977,000	552,000	602,000
Greenfield Village	310,000	314,000	254,000	24,000	16,000
Six Flags Autoworld	301,000	134,000	–	–	–
Auto lease-rental					
Hertz	8,215,000	7,524,000	8,429,000	4,682,000	5,053,000
Avis	5,178,000	5,053,000	3,655,000	2,245,000	3,609,000
Alamo	4,180,000	1,175,000	170,000	46,000	144,000
Automobiles					
Chevrolet	46,641,000	35,305,000	21,992,000	28,754,000	27,515,000
Ford	43,616,000	31,194,000	28,967,000	28,015,000	28,820,000
Cadillac	31,209,000	21,740,000	22,780,000	16,752,000	13,522,000
Baby food					
Heinz	715,000	29,000	34,000	–	41,000
Gerber	121,000	36,000	72,000	216,000	23,000
Beech Nut	71,000	–	129,000	124,000	116,000
Bakery goods					
Nabisco	573,000	2,189,000	3,308,000	2,932,000	2,678,000
Mother's Cookies	352,000	321,000	27,000	–	–
Wonder Bread	261,000	203,000	249,000	233,000	128,000
Baking ingredients					
Aunt Jemima	172,000	99,000	176,000	103,000	284,000
Betty Crocker	93,000	146,000	633,000	543,000	276,000
Pioneer	83,000	22,000	–	49,000	30,000

TOP BRAND SPENDERS IN NATIONAL NEWSPAPER SPACE

	1985	1984	1983	1982	1981
Beers					
Budweiser	$3,117,000	$2,246,000	$2,242,000	$1,929,000	$939,000
Coors	2,055,000	657,000	1,016,000	1,153,000	746,000
Miller	1,925,000	1,279,000	1,556,000	490,000	173,000
Books					
Book-of-the-Month	2,833,000	2,897,000	2,546,000	2,387,000	2,191,000
Literary Guild	1,693,000	1,711,000	1,210,000	1,524,000	1,444,000
Morrow, William	1,150,000	1,108,000	753,000	718,000	822,000
Bus lines					
Greyhound	2,615,000	3,193,000	5,824,000	1,209,000	908,000
Trailways	1,653,000	1,474,000	1,235,000	896,000	652,000
Metropolitan Transit	757,000	235,000	98,000	229,000	177,000
Cable TV					
Home Box Office	4,023,000	2,747,000	1,460,000	6,305,000	4,285,000
Cablevision	3,066,000	4,406,000	2,781,000	1,199,000	–
ESPN	2,639,000	3,675,000	2,541,000	2,394,000	862,000
Cameras-photo supplies					
Kodak	2,578,000	3,595,000	5,105,000	3,650,000	2,401,000
Sony	968,000	595,000	733,000	–	–
Olympus	965,000	57,000	30,000	709,000	465,000
Cereals					
Post	1,035,000	935,000	296,000	443,000	151,000
General Mills	489,000	613,000	1,746,000	420,000	457,000
Ralston Purina	487,000	372,000	1,105,000	26,000	16,000
Cigarettes					
Marlboro	29,064,000	29,328,000	11,062,000	13,207,000	16,713,000
Richland	16,356,000	2,058,000	2,221,000	–	–
More	14,701,000	10,651,000	13,536,000	12,800,000	24,153,000
Cargo airlines					
Federal Express	3,258,000	3,587,000	896,000	864,000	937,000
United Parcel	919,000	–	159,000	218,000	67,000
DHL	374,000	10,000	–	542,000	808,000
Coffee					
Maxwell	2,397,000	112,000	681,000	1,188,000	1,827,000
Community	328,000	149,000	161,000	176,000	74,000
Colombian Ground	269,000	143,000	83,000	31,000	–
Computers					
IBM	28,703,000	33,014,000	7,786,000	4,630,000	1,900,000
Apple	8,139,000	8,026,000	5,123,000	2,235,000	262,000
AT&T	7,580,000	10,073,000	–	–	–
Condiments					
Kraft	826,000	559,000	899,000	1,104,000	1,203,000
Ragu	365,000	413,000	325,000	771,000	237,000
Vlasic pickles	261,000	463,000	105,000	33,000	188,000

TOP BRAND SPENDERS IN NATIONAL NEWSPAPER SPACE

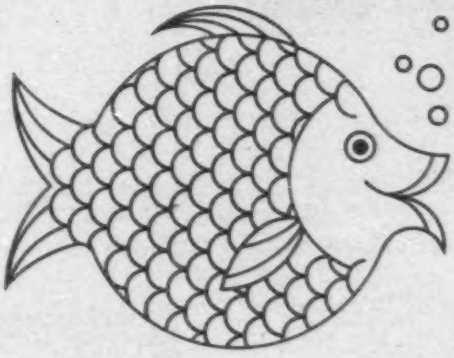
	1985	1984	1983	1982	1981
Confectionery-snacks					
Blue Diamond Nuts	$857,000	$253,000	$156,000	–	–
Peter Paul Cadbury	789,000	338,000	411,000	273,000	273,000
Hollywood Brand Candies	400,000	–	–	–	–
Cosmetics					
Tova 9	2,301,000	1,878,000	1,939,000	1,040,000	–
Estee Lauder	823,000	631,000	679,000	432,000	330,000
Lancome	774,000	527,000	590,000	103,000	–
Couponers					
Valassis	129,958,000	99,256,000	61,735,000	38,951,000	23,439,000
Marketing Corp. of America–NCC/BFD	109,419,000	79,569,000	36,230,000	40,751,000	3,546,000
Marketing Showcase/Product Movers	79,997,000	50,675,000	35,377,000	20,543,000	11,887,000
Dairy products					
National Dairy Board	748,000	–	–	–	–
Frusen Gladje	735,000	24,000	40,000	21,000	–
County Line	657,000	646,000	263,000	97,000	63,000
Dental supplies-mouthwashes					
Topol	1,686,000	–	–	–	49,000
Crest	1,169,000	–	889,000	47,000	123,000
Lavoris	1,158,000	–	–	–	–
Disinfectants-insecticides					
Glade	643,000	–	–	–	–
Raid	570,000	445,000	531,000	329,000	1,040,000
Roach Prufe	257,000	824,000	1,065,000	904,000	432,000
Farm-garden					
Snapper	4,930,000	3,835,000	3,799,000	2,667,000	2,156,000
Toro	3,502,000	3,007,000	2,887,000	2,387,000	1,843,000
Lawn Boy	2,071,000	1,446,000	980,000	648,000	543,000
Feminine hygiene products					
Playtex	535,000	–	–	66,000	36,000
Always	321,000	1,033,000	68,000	–	–
Tampax	233,000	–	64,000	212,000	–
Floor coverings					
Armstrong	4,141,000	777,000	959,000	1,674,000	1,290,000
Mannington	281,000	219,000	165,000	132,000	–
Karastan	122,000	226,000	136,000	94,000	105,000
Fruit & vegetable juices					
Ocean Spray	285,000	381,000	290,000	348,000	561,000
Tropicana	252,000	496,000	974,000	1,010,000	515,000
Sunkist	157,000	69,000	133,000	47,000	33,000
Fruits-vegetables					
Bush's	318,000	151,000	118,000	–	–
Bird's Eye	279,000	446,000	313,000	325,000	411,000
Chiquita Bananas	264,000	111,000	–	188,000	317,000

TOP BRAND SPENDERS IN NATIONAL NEWSPAPER SPACE

	1985	1984	1983	1982	1981
Gas-oil					
Mobil	$7,137,000	$6,448,000	$6,475,000	$7,226,000	$8,105,000
Exxon	2,742,000	1,711,000	1,808,000	1,304,000	1,110,000
Amoco	1,425,000	1,124,000	539,000	177,000	671,000
Headache remedies-sedatives					
Bayer	52,000	177,000	10,000	157,000	225,000
Nuprin	32,000	649,000	–	–	–
Datril	25,000	208,000	167,000	17,000	–
Insurance—Life					
Physicians Mutual	1,996,000	2,219,000	1,705,000	1,657,000	1,184,000
Metropolitan Life	1,676,000	1,151,000	242,000	1,614,000	1,882,000
New York Life	1,554,000	1,892,000	1,463,000	2,267,000	1,405,000
Jewelry—Watches					
Seiko	3,466,000	5,163,000	1,252,000	1,299,000	1,698,000
Lassale	1,851,000	–	–	–	–
Pulsar	684,000	533,000	37,000	29,000	157,000

IF THIS IS YOUR VIEW OF DAYTON, OHIO

LOOK AGAIN



Catch a big one. Dayton is high-tech. Dayton is high-income. And Dayton reads Dayton newspapers. Our market is well-stocked—678,000 adults, 18,000 scientists and engineers,* and a newspaper reach of 79% of $25,000+ annual income households.** Ask your media people to catch a big one for you in Dayton.

* 1983, Ohio Data Users Center
** Dayton only, 1984 Paragon Survey

DAYTON

DAYTON/SPRINGFIELD NEWSPAPERS
Represented nationally by Sawyer-Ferguson-Walker, Inc.

TOP BRAND SPENDERS IN NATIONAL NEWSPAPER SPACE

	1985	1984	1983	1982	1981
Jewelry—Other					
Van Pier & Tissany	$1,109,000	$1,536,000	$120,000	–	–
Oneida Silverware	353,000	343,000	309,000	592,000	188,000
Swank	151,000	315,000	222,000	156,000	228,000
Liquors					
Seagram's	4,332,000	5,694,000	1,516,000	3,418,000	2,384,000
Ballantine's	1,841,000	1,623,000	1,149,000	253,000	433,000
Johnnie Walker	1,493,000	1,502,000	2,087,000	1,746,000	1,609,000
Lotteries					
New York State	1,317,000	702,000	793,000	923,000	900,000
Colorado State	644,000	196,000	433,000	–	–
Michigan State	601,000	680,000	1,081,000	1,449,000	1,341,000
Macaroni products (uncooked)					
Creamettes	718,000	211,000	140,000	357,000	225,000
Prince Macaroni	212,000	79,000	428,000	54,000	46,000
San Giorgio	103,000	146,000	118,000	164,000	165,000

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TOP BRAND SPENDERS IN NATIONAL NEWSPAPER SPACE

	1985	1984	1983	1982	1981
Magazines					
Time	$1,907,000	$1,470,000	$1,803,000	$2,526,000	$2,442,000
TV Guide	1,369,000	1,672,000	4,362,000	1,409,000	677,000
Fortune	1,138,000	1,870,000	880,000	594,000	390,000
Mail Order					
Abernathy & Closther	7,229,000	2,070,000	1,023,000	239,000	1,936,000
Franklin Mint	6,960,000	6,654,000	8,340,000	8,678,000	9,041,000
Shopping Mart	4,049,000	5,335,000	5,253,000	3,344,000	2,083,000
Meats-fish-poultry					
Hormel	1,529,000	5,122,000	4,299,000	3,203,000	3,328,000
Wilson	914,000	1,354,000	1,092,000	1,345,000	434,000
Foster Farms	576,000	457,000	604,000	311,000	81,000
Newspapers					
Investor's Daily	1,675,000	1,740,000	–	–	–
USA Today	1,079,000	1,190,000	1,717,000	835,000	–
The Wall Street Journal	530,000	557,000	649,000	423,000	284,000
Office equipment (minus computers)					
Xerox	8,882,000	7,819,000	12,892,000	5,728,000	4,956
Panasonic	2,197,000	307,000	643,000	27,000	9,000
Canon	1,912,000	1,575,000	163,000	350,000	219,000
Paints					
Sherwin Williams	1,852,000	891,000	647,000	353,000	457,000
Olympic	1,131,000	55,000	71,000	327,000	1,002,000
Benjamin Moore	504,000	579,000	311,000	277,000	317,000
Pet foods					
Purina	1,405,000	1,030,000	1,565,000	2,163,000	974,000
Alpo	562,000	1,444,000	776,000	247,000	116,000
Science Diet	336,000	28,000	77,000	–	–
Phonographs-records-tapes					
Columbia Record Club	10,211,000	10,274,000	7,959,000	7,018,000	5,974,000
RCA	4,330,000	6,712,000	8,723,000	6,966,000	5,480,000
CBS	2,178,000	939,000	280,000	87,000	56,000
Prepared dishes					
On Cor Entrees	607,000	902,000	299,000	95,000	38,000
Banquet	365,000	673,000	237,000	173,000	176,000
Old El Paso	250,000	245,000	49,000	–	–
Public utilities					
AT&T	49,565,000	47,865,000	23,610,000	4,426,000	1,280,000
General Telephone & Electonics	13,382,000	11,299,000	4,655,000	1,258,000	1,508,000
New York Telephone	8,042,000	6,573,000	7,733,000	6,565,000	2,105,000
Radio-tv sets					
RCA	1,427,000	6,391,000	3,936,000	2,991,000	3,587,000
Zenith	1,220,000	1,602,000	963,000	865,000	1,910,000
Sony	1,015,000	1,506,000	994,000	226,000	1,254,000

TOP BRAND SPENDERS IN NATIONAL NEWSPAPER SPACE

	1985	1984	1983	1982	1981
Radio-tv stations					
ABC	$14,388,000	$12,144,000	$10,228,000	$10,241,000	$10,240,000
NBC	9,852,000	10,067,000	7,816,000	11,383,000	13,727,000
CBS	9,113,000	9,649,000	6,695,000	8,424,000	8,658,000
Railroads					
Amtrak	6,756,000	9,505,000	5,979,000	5,358,000	3,741,0000
Conrail	1,353,000	162,000	26,000	63,000	88,000
Norfolk Southern	463,000	217,000	226,000	106,000	–
Ranges-stoves-dishwashers					
Kitchen Aid	3,139,000	1,750,000	766,000	1,012,000	1,041,000
G.E.	1,485,000	1,455,000	2,182,000	655,000	394,000
Jenn	405,000	767,000	612,000	339,000	365,000
Shortenings-oils-margarines					
Imperial	282,000	881,000	566,000	482,000	349,000
Fleishmann's	256,000	328,000	220,000	642,000	416,000
Mazola	192,000	633,000	457,000	273,000	351,000

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Source: 1985 Simmons–Scarborough Study

The Milwaukee Journal
Milwaukee Sentinel

TOP BRAND SPENDERS IN NATIONAL NEWSPAPER SPACE

	1985	1984	1983	1982	1981
Soft drinks					
Coca-Cola	5,644,000	3,893,000	4,267,000	2,535,000	2,191,000
Pepsi-Cola	4,323,000	3,268,000	5,198,000	2,410,000	1,659,000
Royal Crown	2,338,000	747,000	1,244,000	1,044,000	975,000
Steamship lines					
Cunard	8,791,000	9,519,000	4,947,000	5,232,000	3,925,000
Norwegian Caribbean	7,043,000	5,028,000	4,684,000	3,898,000	3,888,000
Royal Caribbean	6,591,000	6,860,000	4,580,000	2,577,000	3,168,000
Tours-travel service					
American Express	14,121,000	10,793,000	7,226,000	8,557,000	5,059,000
Liberty Travel	10,901,000	7,872,000	5,356,000	3,853,000	3,312,000
Pleasant Hawaiian	6,715,000	6,093,000	5,572,000	2,334,000	1,183,000
Trucks-campers-vans					
Chevrolet	4,355,000	2,630,000	1,481,000	1,267,000	1,966,000
Ford	4,116,000	3,328,000	2,747,000	1,578,000	959,000
Toyota	3,732,000	4,583,000	1,476,000	1,561,000	1,399,000
Wearing apparel					
Maidenform	1,003,000	873,000	1,816,000	867,000	402,000
Fashion Galaxy	727,000	25,000	147,000	—	—
Ralph Lauren	711,000	2,079,000	2,174,000	1,747,000	843,000

NATIONAL ADVERTISING INVESTMENTS IN NEWSPAPERS, 1985-1984

Classification	1985 (000)	1984 (000)	Percent Change
AUTOMOTIVE			
Gasoline & Oil Companies	$18,164	$21,541	−15.7%
Leasing & Rentals	78,759	61,005	+29.1
Parts, Accessories & Supplies	7,227	8,475	−14.7
Passenger Cars (New)	537,998	400,631	+34.3
Trucks, Trailers & Mobile Homes	28,366	26,840	+5.7
Automotive Not Elsewhere Classified	2,653	2,679	−1.0
AUTOMOTIVE TOTAL	$673,167	$521,171	+29.2
GENERAL			
Alcoholic Beverages	87,459	105,292	−16.9
Beers	19,665	19,424	+1.2
Wines	10,813	9,616	+12.4
Liquors	56,981	76,252	−25.3
Amusements	13,546	14,239	−4.9
Cameras, Photo Supplies & Services	13,950	21,690	−35.7
Computers, Equipment & Services	92,651	116,927	−20.8
Educational	56,446	45,744	+23.4
Farm & Garden	37,604	32,885	+14.4
Foods	150,946	166,292	−9.2
Baby Foods	969	69	+1,304.3
Bakery Goods	9,267	14,875	−37.7
Baking Mixes, Flour & Ingredients	996	1,852	−46.2
Beverages	42,283	35,115	+20.4
Coffee	5,605	3,305	+69.6
Tea	1,330	1,481	−10.2
Fruit & Vegetable Juices	3,941	7,419	−46.9
Soft Drinks-Carbonated-Diet	3,268	6,435	−49.2
Soft Drinks-Carbonated-Non Diet	21,969	10,577	+107.7
Miscellaneous Beverages	6,170	5,898	+4.6
Cereals	3,395	4,297	−21.0
Condiments	6,436	6,432	+0.1
Confectionery & Snacks	8,748	9,402	−7.0

Classification	1985 (000)	1984 (000)	Percent Change
Dairy Products	20,720	22,172	−6.5
Desserts & Dessert Ingredients	1,384	1,250	+10.7
Fruits & Vegetables	7,457	8,099	−7.9
Macaroni Products-Uncooked	1,844	1,470	+25.4
Meats, Fish & Poultry	19,210	25,476	−24.6
Prepared Dinners & Dishes	7,652	11,550	−33.7
Shortenings, Oils & Margarines	4,472	6,860	−34.8
Soups	2,627	1,652	+59.0
Sugars, Syrups & Jellies	1,696	1,783	−4.9
Miscellaneous Foods	11,790	13,938	−15.4
Franchise Offers	9,016	9,301	−3.1
Help Wanted	97,466	104,618	−6.8
Hotels & Resorts	189,451	160,265	+18.2
Household Furniture & Furnishings	24,499	21,823	+12.3
Household Heating & Home Heating Equipment	14,627	14,341	+2.0
Household Supplies	42,304	39,941	+5.9
Household Equipment & Appliances	73,731	79,335	−7.1
Industrial	65,655	55,150	+19.0
Insurance	84,132	53,234	+58.0
Jewelry, Watches & Silverware	11,807	13,258	−10.9
Mail Order	55,867	49,242	+13.5
Medical Products & Drugs	19,655	34,700	−43.4
Pets & Pet Supplies	7,228	8,381	−13.8
Political	6,619	19,171	−65.5
Professional & Service	21,036	17,043	+23.4
Public Service Utilities & Communications	176,720	174,593	+1.2
Publishing & Media	237,436	230,462	+3.0
Real Estate	65,581	48,273	+35.9
Sporting & Leisure Time Equipment	7,645	10,665	−28.3
Tobacco	204,013	236,354	−13.7
Cigars	1,511	530	+185.1
Cigarettes	199,834	234,502	−14.8
Tobacco & Smoking Accessories	2,668	1,322	+101.8
Toiletries & Toilet Goods	30,594	21,624	+41.5
Transportation	604,593	526,336	+14.9
Airlines	297,758	264,223	+12.7
Domestic	170,884	165,648	+3.2
International	121,610	93,874	+29.5
Cargo	5,264	4,701	+12.0
Bus Lines	9,866	9,051	+9.0
Railroads	10,153	11,525	−11.9
Steamships	91,947	88,033	+4.4
Tours & Travel Service	186,417	147,031	+26.8
Miscellaneous	8,452	6,473	+30.6
Wearing Apparel	29,005	39,589	−26.7
General Not Elsewhere Classified	424,538	344,028	+23.4
GENERAL TOTAL	**$2,955,820**	**$2,814,296**	**+5.0**

Classification	1985 (000)	1984 (000)	Percent Change

Classifications projected to U.S. totals by Media Records ©1984

The full report is available from Media Records, 370 Seventh Ave., New York, N.Y. 10001. Prices are $1,200 for the full report; $175 to $345 for complete class breakouts; and $125 for a sub-class reading.

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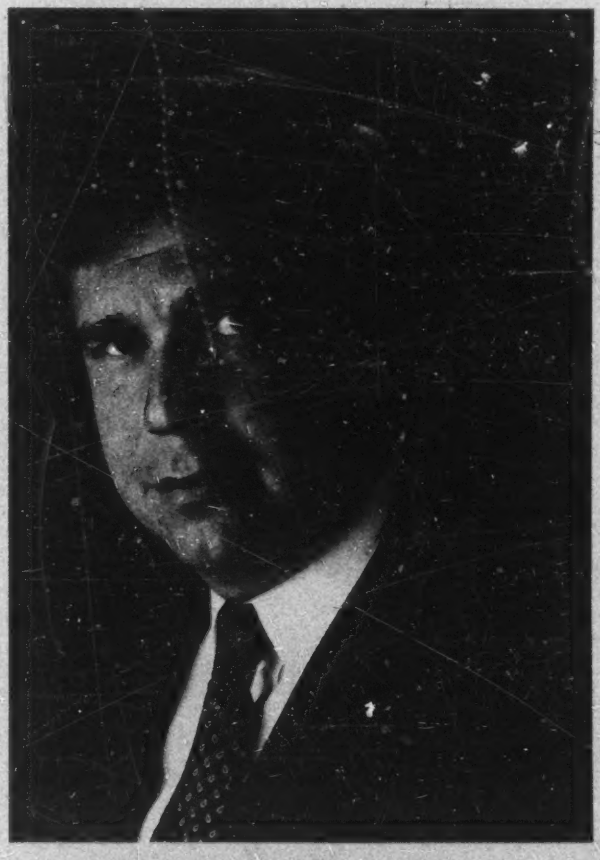

BRAND REPORT

NO. 134: SPORTING GOODS

A TIGHT GAME

by Fred Pfaff

"There is no such thing as a hot sport now," says Dick Lipsey, sports research director at Port Washington, N.Y.-based NPD Group. And that fact faces equipment marketers with a tough challenge: to keep and to sell the same customers on new, improved merchandise.

It may be no surprise, then, that Lipsey names "the performance markets" — referring to such pursuits as routinized exercise — as growth categories. The practice caught on so quickly that the tools for it are new to everyone involved; frontrunners can run up sales until all players are supplied. For most other sports categories, though — staples hunting and fishing come to mind — a dearth of new buff segments has made them commodity markets, where most sales are replacements.

Such is the environment confronted by the major brands in the top eight sales markets — the marketing and media players this report profiles. Year-end 1985 sales tallies by the National Sporting Goods Association suggest this order: (1) athletic footwear, $2.6 billion; (2) firearms and hunting equipment, $1.7 billion; (3) exercise equipment, $1.2 billion; (4) camping equipment, $723.9 million; (5) golf equipment, $737.9 million; (6) fishing equipment, $680.7 million; (7) downhill skis, $462.5 million; (8) tennis equipment, $273.4 million.

There are those who fear for the future of sports marketing. "The sporting goods business just isn't attractive to a lot of young people," says Dick Lipsey.

Nike is not just for running shoes, as evidenced by their golf line.

Meanwhile, the fitness craze has helped breed tougher customers, more attuned to performance than ever before. Lipsey contends that "you can't sell a bad piece of sports equipment. The buyer today is much more educated and conscious of quality." But ad support from manufacturers is often too little to address this fact. "It's an industry that needs the most advertising talent," Lipsey rues, "but since the revenue is the least for the agency, they give the job to the kid who just walked in the door."

His assumption is that companies could use talent tapped in to a changing marketplace where the old values have given way. Gone may be the days when consumers love a sports product because it lasts. In a society of exercise devotees who link fitness with sex appeal, Lipsey doubts "durability means anything anymore. Performance and fashion are the buzzwords of sports today."

ATHLETIC SHOES

Glance at feet on the street anywhere in the U.S. and you can guess the hottest category and brands in the sports marketing world. The athletic shoe business, buoyed by a three-year-old import sensation from England named Reebok (formally named Reebok International), hit sales of $2.6 billion in 1985 according to NSGA.

Ad competition is getting tougher, and distinct. Reebok put its ad budget up over $10 million for new print efforts and its first try at tv this year,

going for the fashion-conscious masses. Nike nips its heels by hardening a media schedule in buff books while also opening up to more tv time.

Reebok International "just blew everyone's minds," says Bob Carr, editor-in-chief of *Sporting Goods Business*. Translation: Without a list of best-liked athletes endorsing their shoes — the standard first step in today's sports world — the company sprang up 372% to $307 million in 1985 sales, and is expected to top $600 million in 1986.

To maintain this pace, Reebok is beefing up its marketing staff and upping its ad expenditures to over $10 million in 1986. LNA reports the company spent $3.8 million last year, but Reebok reports it spent $6.5 million. Prime time tv now joins expanded print schedules. According to Sharon Cohen, vice president of advertising, 30-second spots for a new line of basketball shoes (models 4600 — $46, 5600 — $56 and 6600 — $66, which the company hopes will let it step out of its image as a yuppie women's brand) run in the NBA playoffs and finals in five markets: Chicago, New York, Los Angeles, Philadelphia and Boston, whose Celtics stars Danny Ainge and Dennis Johnson will be sporting the models. Two-page, four-color ads in *Sports Illustrated* will also showcase the new shoes.

A series of new product-specific ads with a consistent new look will appear by fall. An Instructor 5000 state-of-the-art aerobic shoe, among other products, will be photographed instead of illustrated, as brand awareness ads have been. A print backbone balances special-interest books with general consumer publications such as *Sports Illustrated*, *Esquire*, *Self* and *GQ*. Meanwhile, print ads for new walking shoes planned for *Walking* and general consumer books are evidence that at Reebok the bet is heavy on the expected boom.

Reebok rewrote the rules in positioning its shoes.

That's not so at **Nike, Inc.**, whose Air Jordan basketball shoes — backed by superpro Michael Jordan — helped shoot sales up 21% for the first nine months of its fiscal year 1986 alone (from $431.5 million for June 1984-February 1985 to $521.4 million this year). The company is sticking with shoes for the sports it currently serves.

According to Brown, the company is limiting its huge list of pro endorsement contracts and cutting back on wide sponsorships that extended down to high school teams. Brown won't cite figures, but says the company that made its mark with sponsorship now keeps a closer ratio of ad-to-sponsor dollars than ever. According to LNA, Nike put $2.4 million behind its 1985 ad efforts.

"We're becoming more product oriented than brand oriented in our advertising," says creative director Peter Moore, whose action ads let consumers fancy they're in the athlete's shoes. Running shoes ads continue in such buff books as *Runner's World* as well as in grass roots magazines — placements intended in part to promote the sport itself. The broader-based tennis and basketball markets get broader schedules. Once confined to such vertical books as *World Tennis* and *Tennis*, Nike's Wimbledon line goes into *Sports Illustrated* and onto tv this spring. In addition to *Sports Illustrated* and tv exposure, Air Jordan and the Big Nike high-cut basketball shoes go on the tube. Various shoes are also showcased in *Vogue*, *GQ*, *Mademoiselle*, *Rolling Stone* and *Esquire*.

FIREARMS AND HUNTING

"Hunting is dead." The statement fires like a gunshot from Bob Carr, editor-in-chief of *Sporting Goods Business*. Marketers and industry watchers dispute his drama but agree with his reasons: ever fewer areas to hunt, high fees for permits and the sport's burgeoning social stigma. Largely a retirement game, hunting hovered at over 21 million participation last year, according to NPD Group's Dick Lipsey.

Some marketers blame themselves for the low cultivation rates that make

Rebate offers abound in the firearms segment, which relies heavily on replacements.

rifles a replacement market. "Generally speaking, there's been relatively little creativity on the part of the firearms industry to arouse interest and get new hunters into the game," says John W. Shields, vice president of marketing for U.S. Repeating Arms, maker of the famous Winchester brand rifles. "But it would take tremendous money to get new hunters so that we could sell rifles to first-time shooters."

"There's no profit on guns anymore," says Mark Klionsky, managing editor at *Sporting Goods Business*. "Fewer stores want to carry them. Manufacturers may expect slight sales increases, but profits keep going down. It's a very unstable business." To make matters worse, he notes, sporting goods and hunting specialty stores are refusing such dominant brands as Re-

SPORTS EQUIPMENT ADVERTISING EXPENDITURES, 1985

[illegible]	TOTAL ($000)	[illegible]	NEWSPAPER [illegible] ($000)	NETWORK TELEVISION ($000)	SPOT TELEVISION ($000)	NETWORK RADIO ($000)	OUTDOOR ($000)	CABLE TV NETWORKS ($000)	MAGAZINES ($000)
ATHLETIC SHOES									
Reebok USA	3,825.6	3,720.9	97.0	–	7.7		–	–	–
Nike Inc.	2,415.7	620.5	–	40.8	1,422.8	–	5.1	326.5	–
Converse Inc.	3,056.5	1,814.8	–	775.2	426.2	–	1.4	40.9	–
Adidas USA	703.7	288.6	–	82.5	6.0	–	–	326.8	–
FIREARMS AND HUNTING									
Dupont de NeMours E.I. and Co. Inc. (Remington)	563.4	563.1	–	–	–	–	0.3	–	–
Olin Corp./U.S. Repeating Arms Co. (Winchester)	455.4	454.6	–	–	–	–	–	0.8	–
Sturm Ruger & Co. Inc.	292.5	292.5	–	–	–	–	–	–	–
EXERCISE EQUIPMENT									
Diversified Products Corp.	6,334.8	2,093.6	–	4,235.6	5.6	–	–	–	–
Ajay Enterprises Corp.	502.2	–	–	495.4	2.4	–	–	–	–
Marcy Gymnasium Equipment Co.	383.9	379.1	–	–	–	–	4.8	–	–
CAMPING EQUIPMENT									
Coleman Co. Inc.	1,229.6	504.5	141.5	–	351.1	–	2.3	230.2	–
American Home Products Corp. (Wenzel, Kelty)	NA								
FISHING EQUIPMENT									
Brunswick Corp. (Zebco)	228.1	165.5	–	14.2	0.9	–	–	0.5	47.0
Daiwa Corp.	456.2	149.0	–	–	136.6	–	–	170.6	–
Anthony Industries (Shakespeare)	444.9	410.4	–	–	34.5	–	–	–	–
Berkley & Co.	1,003.1	906.1	–	–	76.3	–	–	20.7	–
GOLF EQUIPMENT									
Acushnet Co. (Titleist, Pinnacle)	5,639.4	2,457.9	–	2,977.9	169.2	–	–	34.4	–
Wilson Sporting Goods Co.	1,772.5	331.4	–	1,376.6	12.0	–	–	52.5	–
Spalding & Evenflo Co. (Spalding, Top Flite)	5,804.8	2,542.7	–	3,063.5	76.0	–	–	122.6	–
Minstar Inc. (Ben Hogan)	2,055.8	1,354.8	–	1,263.1	37.9	–	–	–	–
DOWNHILL SKIS									
Rossignol Ski Co.	150.8	142.5	–	–	1.5	–	6.8	–	–
K2 Corp.	71.3	71.3	–	–	–	–	–	–	–
Olin Corp.	130.5	130.5	–	–	–	–	–	–	–
TENNIS RACKETS									
Prince Manufacturing Co.	1,022.5	979.9	–	902.6	–	–	–	–	–
Wilson Sporting Goods Co.	294.5	287.9	–	–	–	–	–	6.6	–
Minstar Inc. (Head)	834.6	834.6	–	–	–	–	–	–	–
Kennex Sports Corp.	213.8	213.8	–	–	–	–	–	–	–

Sources: Leading National Advertisers; Media Records for news, spot, and network figures for 1985 calendar.

mington and Winchester because the lines now sell to discount mass merchants like Sears.

Media options are few. Tv time is beyond many hunting budgets, and a federal law prohibiting gun sales to non-state residents makes direct mail illogical at best. Luckily, "There are many more magazines targeted to the hunter than we have a budget to cover," says Shields at U.S. Repeating Arms.

Fewer hunting areas, higher fees and a bad image have hurt the sport.

Remington Arms Co., considered the category leader with a major stake in shotguns, now approaches both the upscale and non-upscale hunter with ads for four new products: a model 870 "Wingmaster" shotgun, an interchangeable choke tube system (which patterns a shotgun shot) called "Remchoke," a pricy model 700 mountain gun and a special-purpose shotgun for hunting deer. The new product ads supplement six "game specific" ads, themed "Remington Country," that were introduced in 1985 to stress product applications.

According to Mark Sweetland, account executive at agency Rumrill-Hoyt, Remington balances buys of national outdoor and hunting magazines with schedules in their regional competitors. To *Field & Stream, Outdoor Life* and *Sports Afield* are added a list of books that includes *American Hunter, The American Rifleman, Guns & Ammo, Shooting Times, Fins and Feathers* and *Alaska*. Dealers get co-op funds equal to a percentage of their 1985 product purchases. LNA reports that the company made all but $3,000 of its $563,400 1985 media buys in magazines, but Sweetland counters that both the 1985 and 1986 budgets top $1 million.

Buying concentrates on magazines for **Olin Corp.** and struggling licensee **U.S. Repeating Arms Co.**, makers of the other dominant brand, Winchester. Olin makes the double-barrel shotguns, U.S. Repeating Arms the rifles and single-barrel shotguns. Multi-million dollar debt drove U.S. Repeating Arms into Chapter 11 this past January.

But the company doesn't expect its current financial, managerial and marketing restructuring to cut heavily into advertising. According to LNA, $325,900 backed the brand in magazines last year. Vice president of marketing John W. Shields says the U.S. Repeating Arms schedule — ads without themeline that stress the company's quality craftsmanship — keeps going in national books: *Guns and Ammo, Shooting Times, Sports Afield, American West, Outdoor Life, Field & Stream* and *The American Rifleman*. Meanwhile, Olin's shotgun ads continue in such gun books as *Shooting Times, Guns, Trap & Field* and the *American Shotgunner*.

According to LNA, competitor Sturm, Ruger & Co. Inc., a big name in semi-automatic rifles that limits distribution to 90 wholesalers and wins praise from one industry watcher as

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Exercise equipment is almost certain to experience a shakeout.

"the healthiest company in the firearms industry," spent $292,500 in magazines in 1985. —

EXERCISE EQUIPMENT

The hype that induced more than a few bod-conscious Americans to put treadmills and dumbbells in their dens is beginning to cool down. While sales suggest the category is still hot (a rise from $1.06 billion in 1984 to $1.25 billion in 1985, according to the NSGA), some say the market has changed direction; they're bracing for a shakeout.

"We're facing dynamic changes in the industry," says Dick Rogers, executive vice president at Walker & Associates, agency for category leader Diversified Products Corp. (DP) "Everybody who could make or import something got into the fitness industry when the boom was on. That brought tremendous competition for floor space and a price-point battle. Now we're seeing a shakeout. And we're seeing a separation of low-end and high-end products with nothing in the middle."

One noteworthy trend is the fact that, of the 24 million Americans exercising with equipment in 1985, half were women, according to Dick Lipsey, sports research director at Port Washington, N.Y.-based NPD Group. Home gym use is a 30% female routine, cycling a 70% female exercise. To disprove more assumptions, some marketers now see the health-conscious among the over-40 segment as their hottest target.

Sporting Goods Business managing editor Mark Klionsky says the new buzzwords are specialization and versatility. Over half the fitness companies, he speculates, exploit small niches with specialty products; others plan sets that do it all. "Companies are looking to broaden the appeal of the machines," concurs NPD's Lipsey. In sports, that means high tech: Combined recumbent cycle-rowers are but one type of versatile set Lipsey sees prodding the category.

Leader DP offers many options.

Diversified Products Corp. (DP), the largest manufacturer of exercise equipment, built the biggest share (DP claims 60%) by making the most products, pricing affordably and concentrating on brand awareness. Barbells, treadmills, exercycles, rowers and home gyms (12 GymPac models from $229 to $500) — DP makes it all.

Price is key to DP's favor among the "unsophisticated consumer," contends *Sporting Goods Business'* Mark Klionsky. "They're making a low-end, mass-merchandise product and promoting it through the typical mass-merchandise channels." To be sure, LNA reports that tv takes the lion's share of DP's $6.3 million ad campaign, tagged "DP fit for life."

Last year, DP widened its ad sights. Male-oriented programing was balanced with prime time. "We stayed in *Monday Night Football*, but moved into *Dallas* and *Dynasty*," says Dick Rogers of agency Walker & Associates, who installed DP equipment in his agency and pumps GymPac before every afternoon run. Cable buys and schedules in *People*, *Esquire*, *Time*, *Sports Illustrated* and *Self* rounded out the mix, which LNA reports cost the company $6.3 million. Now DP is readying to challenge the category's — and its own — traditional target (25-

30% of our readers own a bicycle, 24% own golf irons, and 23% own weights or other exercise equipment.

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54, 50%-50% men/women, $25,000+ household income) with a campaign set to break by September.

Ajay Enterprises Corp. built the second-placed share, according to industry watchers, with a similar strategy: mass merchandising a broad product line. According to LNA, Ajay spent $502,200 on media in 1985, while another competitor, Marcy, spent $383,900 in total.

RODS, REELS AND TACKLE

"We're constantly fighting the participation battle," sighs Tom Conley, executive vice president at the American Fishing Tackle Manufacturers Association (AFTMA). "Our sport hasn't been growing in the past few years. We're trying to get a whole new generation of anglers created."

Sporting Goods Business' Bob Carr notes fishing is static but recession proof. A rod and reel isn't a major expense. Some high tech new products aside, he says, "you're fishing for less than you were 10 years ago." Sales are largely replacements; fishermen need various reels for different fishes. But the move to high tech is coming in areas that may hurt rod and reel sales. Among them are electronic fish finders, depth finders, sprays that excite fish and computerized selectors that tell fishermen what color lure to use.

Brunswick Corp.'s **Zebco** Division built its category lead — it claims a 38% share — brand awareness and record sales year in 1985 with product breadth and less media reliance than its competitors. A state-of-the-art baitcast reel, the Quantum ($79), drew most of the company's $181,100 1985 budget as reported by LNA, with mass audience ads in such outdoor books as *Outdoor Life* and *Field & Stream* and fish-specific ads in such regionals as *Salt Water Sportsman*. National and regional cable fishing shows and retailer promotions round out the effort.

Number-two **Daiwa Corp.** spends more for a smaller 19% share, according to one industry observer. LNA estimates the company spent $456,200 last year to cast out its message, "In fishing, there's Daiwa and a school of imitators." This spring the company breaks ads for six new reels. According to Deb Bynum, media supervisor at agency WFC Advertising, buys in

Daiwa advertises in over 100 national, regional and local books.

trade books *Sporting Goods Business, Sporting Goods Dealer, Fishing Tackle Trade News* and *Fishing Tackle Retailer* are supplemented by schedules in 100 national, regional and local magazines. The list includes *Field & Stream, California Angler,* and *Outdoor Life*..

These two are the biggest, but not the only fish in the sea. LNA reports that Anthony Industries Inc. billed $444,900 for its highly regarded Shakespeare line, while Berkley & Co. outspent them all. LNA reports the Berkley line had a $1 million media backing, mostly in magazines.

TENNIS RACKETS

Marketers agree that tennis is "flat," as number-two Wilson Sporting Goods Co. vice president of advertising and director of public affairs David Lumley prefers to put it. Participation has waned since tennis' boom in the early '70s, when televised tournaments helped win a broader following. According to Lumley, the game has since lost 30%-40% of its players to such other activities as jogging and biking. Now 19 million play tennis, 600,000 less than in 1984, according to NPD Group's Dick Lipsey.

"We depend upon replacements," says Ed Volkwein, vice president of marketing at category leader Prince Manufacturing Inc. Price-conscious consumers aren't complaining — the trouble in selling rackets has brought prices down snarply. Notes Dave Hol-

Top-ranked Prince adds consumer magazines to its buff lineup.

lis, customer service manager at Donnay USA, "There are now an enormous number of good-playing graphite rackets for under or around $100. Five years ago, they were around $175." Hollis sees specialty stores thriving off consumer confusion at the plethora of sizes, shapes, brands and technologies in the market.

Major racket makers are now balancing their sponsorship of big-name touring pros — an essential practice on which some feel they relied, and spent, too much — with clinics and demonstrations at the grass roots level, but the prognosis is mixed. Lipsey contends that the game courts the youngster at the expense of an aging market, and may be in for rude surprises as a result. But Donnay's Hollis counters, "There are a lot of small things happening in tennis that add up to a bit of a real rebound."

Prince Manufacturing Inc., the category leader, keeps building its product line. The company jumped into the lead in the '70s with the introduction of the first "oversized" rackets (series 110). Last year new midsize (series 90) and kingsize (series 125) models hit the stores. All told, Prince now markets 10 models, priced from $39 to $499, and makes most sales on its oversized rackets.

To pull together the various rackets and such other products as apparel, Prince carries on a repositioning campaign begun last year. According to Ed Volkwein, the new tagline, "Let the games begin," aims to suggest "you've got the best equipment in your hands." Both brand and product ads (for series 90 midsize models and new ceramic racket, the Spectrum Comp) get heaviest schedule spending for cable telecasts of pro tournaments. Since Volkwein realizes the tennis books reach only a small segment of the tennis public, such buys are rounded out by *Rolling Stone*, *People* and, for upper-income reach, *The New Yorker*.

Wilson Sporting Goods Co., the perennial first name in tennis when rackets were wooden, has started its way out of a deep slump that followed industrywide changes in racket composition. Wilson lagged the boom in oversized rackets, a misjudgment traceable in part to the company's then-parent, PepsiCo Inc.

"In our great growth years from the 1940's to the 1970's, we were always the innovator," says David Lumley. "In the late '70s, we took the Pepsi strategy: Let someone else innovate, then come in and beat them on price and distribution. But we found out that in sporting goods, who comes first wins."

Leadership is now the buzzword at Wilson. Chairman and chief executive officer Jack Murray and a group of investors bought back the company last September. Since then, Murray has trimmed $4 million from its payroll, restructured management and stepped up a computerization that's cut racket development time by 40%. Since many top pros are taken for endorsements, the company is sponsoring juniors who

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may be future stars. Wilson is also right in front with the next high tech step: ceramic rackets, which reduce vibration.

Advertising is back to basics, says Lumley, as the company tries to re-establish itself among "hardcore consumers." According to LNA, Wilson spent $287,900 on magazines and $6,600 on cable for its rackets in 1985. This year, says Lumley, $300,000 worth of ads explaining that ceramic rackets aren't brittle are slated for the buff books, with single-page and spread buys of *Tennis*, *World Tennis*, *Inside Tennis*, regional *Tennis West*, *Tennis Industry* and *Tennis Buyer's Guide*. The promotion budget, meanwhile, calls for more than $3 million.

While a constant purchase and $129 million subset, balls don't get big billings. Wilson's Rally, a 7%-larger 1985 introduction, has yet to sell off its initial production run; yet Lumley says Wilson's share jumped about 10% to 60% last year. Wilson now aims for endorsements by major pro tour events and the free advertising that results. Main competitor Penn Athletic Products Co., searching for an agency, hasn't run an ad in almost a year.

According to LNA, third-ranked competitor Minstar Inc. spent $834,600 to advertise its Head rackets last year. Tv commercials starring black tennis legend Arthur Ashe once aired for Head's rackets. But Minstar is tightening the advertising focus. Head's four new Mid-Plus Pro Series rackets get the sell through fun print ads for serious players in such magazines as *Tennis*, *Tennis USA* and *Inside Tennis*. LNA shows that runners up Yonex Corp. and Kennex Sports spent $301,500 and $213,800 on ads in 1985, respectively.

GOLF EQUIPMENT

It's only logical that golf participation has increased over the past 10 years. It is, after all, the perfect game for a greying population. Last year, rounds played were up, according to NPD Group's Dick Lipsey. That regular players are playing more often is good news for marketers, particularly of golf balls, big moneymakers that Wilson Sporting Goods Co.'s David Lumley calls "probably the singular most profitable products in sporting goods."

Golf remains largely a men's market, as Lipsey reports 74% of the regular players last year were men. But it's a slight age shift that has marketers wetting their lips. Signs are that it isn't just the getting-on segment that's

Golf balls drive up their marketers' bottom lines.

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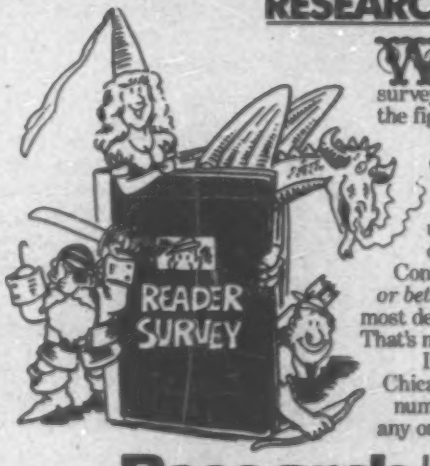

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teeing off; the sport is gaining acceptability among ranks of younger men who previously shunned the sport. Last year, those 18-34 accounted for 42% of regular players, Lipsey notes.

The sport can bring big tickets beyond the budgets of its players. Public greens fees can top $15; balls — which every hacker knows are all too easy to lose — typically retail for more than $1 each; clubs average several hundred dollars a set, private club memberships several thousand to start. Yet according to Lipsey, only 47% of regular players have household incomes of over $35,000 a year.

Golf leader **Acushnet Co.** claims its flagship Titleist, the number-one golf ball since 1949, currently flies and rolls for 75% of the players on the pro tour. But not because they're paid to play it. John Hoagland, director of marketing/balls and putters at Acushnet Co., shuns sponsoring pros and tournaments or hiring players as spokesmen, opting instead for product-oriented tv spots and print ads.

Both 30- and 60-second spots on network tv tournament telecasts, along with schedules in *Golf* and *Golf Digest*, court the heavy golfer who plays more than 24 rounds a year. Limited ads in *USA Today*, *Sports Illustrated* and other horizontal vehicles woo the less frequent golfer who is the product's second target. Themed "The number one ball in golf," the message is consistent quality. Meanwhile, ads run in *Golf* and *Golf Digest* for Acushnet's Titleist clubs ("Tools for the art of golf"), Pinnacle clubs ("Get it all") and Pinnacle balls ("The distance and durability sensation"). According to LNA, the total cost Acushnet $5.64 million last year in ad expenditures.

The challenge in golf is to bring in a younger breed of players.

Distance is the message behind re-

Old pros deliver Wilson's distance message for Ultra.

structured **Wilson Sporting Goods Co.**'s drive to re-establish itself in the upper echelons of golf. Its first ads in a year broke in January for a new bright-colored, long-playing ball called Ultra, which has been winning three out of four field tests for distance against other balls. Although "It'll change the way you play" speaks to all ages, the most-popular tv spots portray middle-aged golfers.

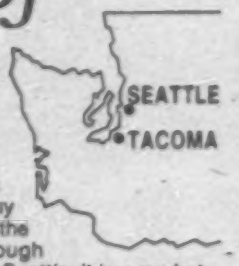
Since Lumley firmly believes tv sells balls and clubs, a big chunk of the more than $2 million he says Wilson is spending pours into 15- and 30-second spots on televised pro tournaments week after week. Golf nuts are reached in print through *Golf*, *Golf Digest*, *Golf Illustrated*, and regional books like *Florida Golf Week*. The upper crust clients of teaching pros are reached through *The Golf Club* and *Executive Golfer*, while fans see ads in *Golf World*. More than $2 million is more than last year, according to LNA records, which put Wilson's golf spending at $1.8 million.

According to LNA, **Spalding & Evenflo Co.** led the field in golf media spending last year, putting $5.8 million behind its Top-Flite golf balls and Spalding and Cannon brand clubs. Minstar Inc., maker of the AMF Ben Hogan line of balls and clubs, spent $2.7 million, according to LNA.

CAMPING EQUIPMENT

NPD's Lipsey divides camping into two types. The first, backpacking,

A Tale of Two Cities



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Coleman and Kelty stage a study in contrast — macho vs. subtlety — in different outdoor books.

draws a slightly younger following, 60% aged 18-34, some 31% of whom have household incomes of more than $35,000. Overnight campers who hike during the day, Lipsey reports, are ages 18-34 (44%) but have slightly more spending power — 35% have household incomes over $35,000.

But there's little glow to the camping advertising market. Buyers tend to simply "look for a purchase within a price range," says LinDea Gregory, advertising and sales promotion manager at American Home Products Corp., maker of the Wenzel and Kelty lines. Price-driven buyers are one justification for low spending. While LNA reports that brand leader Coleman Co. topped the $1 million mark in 1985, no competitor approached that budget. The practice itself has a price. "Except for the Coleman name, at the mass retail level, there's no brand recognition," admits Gregory.

Coleman Co. put $1.2 million behind ad efforts — under the trademark tagline "We outfit your outdoors" — to project its image of breadth and quality last year, according to LNA. Indeed, assistant advertising manager Marian Kline attests the company markets so many products — from propane heaters to lanterns to frame packs — that it's tough to pick out products to promote.

But cost has Coleman cutting out tv this year in favor of increased direct mail, Kline reports. Print ads created by Sullivan Higdon & Sink Inc. — which was replaced this January by Barkley & Evergreen Advertising, Inc. — continue to run in a wide range of outdoorsy books. The schedule stretches from *Canoe* to such regional camping annuals as *New Jersey Campground Directory*.

American Home Products Corp., whose popular Wenzel and specialty Kelty lines rank it second in trade watchers' eyes, lacks the budget to compete for brand image. Against the entrenched Coleman line, says LinDea Gregory, "a consumer ad campaign for recognition would require millions over a long haul." Instead, she reports, the company puts its $550,000 ad/promotion budget mostly into sales promotions and rebates — $8 and $10 off on Wenzel tents, for example, which retailers can advertise without co-op aid. Ads do run for the higher-quality,

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**ABC Publisher's Statement, March 31, 1985

The Charlotte Observer

specialty-distributed Kelty line, however. The schedule runs in *Backpacker, Outside, Sierra* and *Women's Sports and Fitness*.

DOWNHILL SKIS

"You're talking about an industry that lives and dies on what happens in the sky," says Michael Solow, senior writer at Durfee & Solow, agency for Rossignol Ski Co. "Acts of God are beyond the realm of marketing."

A decade of substantial growth ended with poor snow and a recession (late 1970's-early 1980's). The industry took a spill, Solow notes, and participation has since flattened out, at least partly due to a rise in lift-ticket prices caused by skyrocketing liability insurance rates. Currently, 9.5 million Americans — 57% of them male, 55% ages 18 to 34 — ski downhill, according to NPD Group's Dick Lipsey.

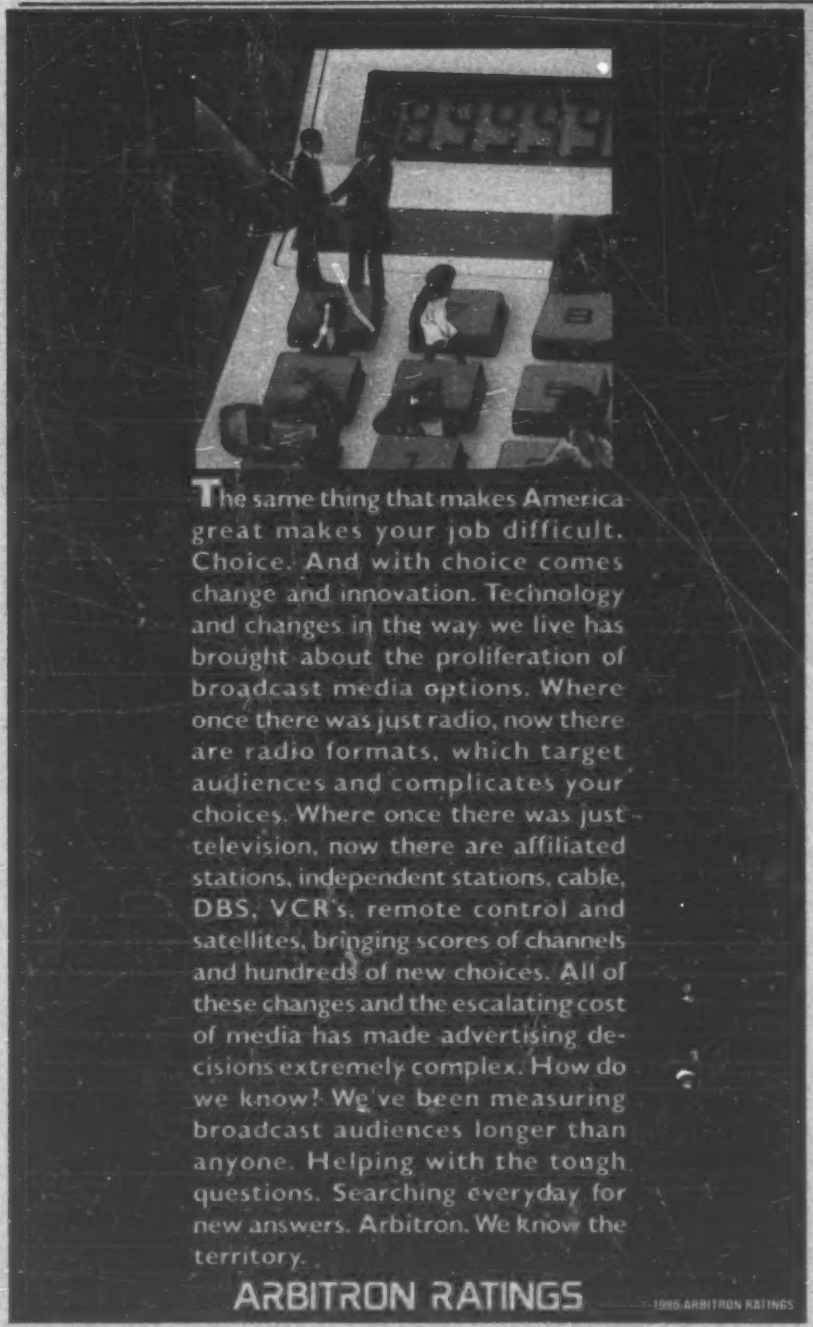
Now companies eye a burgeoning trend toward family involvement: older couples with the wherewithal to introduce their young kids to the expensive sport. And to start kids down the slopes, Ski Industries America now runs Invitation to Skiing, a co-op effort funded by ski shops and resorts, that offers rental equipment and beginner lessons at bargain prices.

Rossignol hopes to move into consumer magazine placements.

Rossignol Ski Co., the leader according to *Sportstyle* with a share of market agency writer Solow estimates nears 25%, is now pushing a new Quantum line of recreational skis. Not only is the traditional frontrunner in innovations departing from its racing orientation, it may rewrite its media schedule as well. Finances permitting, the company will broaden its time-honored media buys of *Ski, Skiing* and *Powder* with space in *The Wall Street Journal* and local Sunday magazines in snow-country markets where Rossignol distribution runs high. According to LNA, Rossignol spent $150,800 on media last year— a figure Solow says is "way low."

K2 Corp., the category's second runner according to *Sportstyle*, is following the leader in pitching recreational skiers. A few years ago, with twin idols Phil and Steve Mahre under contract, K2 ads talked to the racer. Those stars are still spokesmen, but a new campaign aimed at recreational skiers breaks in June in *Ski, Skiing, Powder* and possibly other vertical books. With 16 models — from $350 racing skis to $125 junior skis — in its lineup, K2 also sponsors amateur ski races across the country.

Olin Corp., ranked third according to *Sportstyle*, spent $130,500 on media last year, according to LNA. ■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A MATTER OF HOURS

THE PART-TIME PROBLEM

Recently I was having lunch in the office of a woman friend who heads an account group at a large advertising agency. It was about 2 p.m. when a young account executive stuck her head in the door, announced she was leaving for the day and departed.

"Susan (not her real name) is working a 9:00-to-2:00 day until her baby is older," my friend explained. "I'm a woman, so I'd like to be sympathetic. But I'm also a manager, and it means that a lot of us are working late every night to take up the slack. Frankly, I'm fed up. I think my top management has made a mistake in encouraging part-time mothers."

It's a backlash that is increasing, and it's a backlash coming more from women than from men. We watch new mothers return to the work force (and statistics say over 60% of managers and non-managers alike take just five to eight weeks off after giving birth), struggle with problems of fatigue, the baby-sitter who doesn't show up and end up asking for a part-time schedule.

Does it work? Not in the advertising business, or at least most areas of it. I'm not talking only about senior people, either. If a junior copywriter is important to an account, what happens if the client can't meet until 5 p.m. and she's gone home two hours earlier?

I don't believe that a woman who wants to be successful in our business can give it less than top priority. That's what I've done; put career first, husband second, children third. My marriage is terrific. So are our daughters.

I encourage women in advertising to stay home with their babies as long as they want to. Once they come back to their offices though, come back dedicated to *full time*.

Another eternal question that affects both sexes is upon us again: summer Fridays. Some advertising agencies close every Friday during July and August. I envy them, and wonder how they can do it unless their clients are closed too.

Some agencies close at 1:00 p.m. every Friday; some give staffers alternate Fridays off. At Muller Jordan Weiss, we've found a schedule that suits us and, more important, suits our clients.

For most of the agency, summer Friday hours are 9 a.m. to 1 p.m. However, for service departments who can never count on leaving early, we go the alternate Friday route. But if you're on duty for a full day on Friday, don't plan on the 4:12 to Westhampton. You're on until 5 p.m. Or 6 p.m. Or whatever hour it takes.

Like most things in our business, it's a matter of commitment.

Jane Maas is President of Muller Jordan Weiss, a New York-based advertising agency with offices in St. Louis and Toronto.

OUR READERS TELL US . . .

Summertime, and the living is easy . . . or is it? As we head into the dog days, some companies are slowing down and giving their employees a breather from the usual hectic pace. How much of this is the exception and how much the norm? Research USA, Inc., Chicago, went to poll-y-setters among our readers to find out.

1) For what type of company do you work?

Advertising agency	51.2%
Consumer goods/service marketer	48.8%

Base: 168

2) Does your employer make an issue of personnel starting their workday by a set hour?

	Agency	Advertiser	Total
Yes	75.6%	62.2%	69%
No	24.4	37.8	31.0
	100%	100%	100%
Base	(86)	(82)	(168)

3) If yes, will a worker's career suffer if he or she works under another schedule?

	Agency	Advertiser	Total
Yes	61.6%	80.4%	69.8%
No	33.8	19.6	27.6
No answer	4.6	—	2.6
	100%	100%	100%
Base	(65)	(51)	(116)

Would you prefer to work under a "flex time" arrangement that allows you to set your own hours?

	Agency	Advertiser	Total
Yes	70.8%	66.7%	69.0%
No	29.2	33.3	31.0
	100%	100%	100%
Base	(65)	(51)	(116)

POLL

HAVE A LITTLE FAITH

Most of what the advertising business turns out today — in every department — is junk. And it will only get better if the people who do the work want to make it better.

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We believe that if we can attract this kind of person to our agency, we will be successful. And, because of who they are, they won't need to be beaten, needled or frightened into performing. They want to perform, to succeed.

We *are* a business. We *do* have rules. And we *do* keep tabs. (We maintain one of the most sophisticated cost accounting systems in the business today, in fact.)

But the application of our rules and regulations is as important as the rules and regulations themselves. Rigidity is for children and soldiers and, perhaps, creative people whom you don't altogether trust. It's not for smart, highly motivated, professional adults.

So . . . do our people put in a full 40-hour week? No, in fact all our people put in *more* than a 40-hour week. Why? Not because they're told to, I assure you. They do it because of who they are and what they are, and what they're trying to accomplish: the best work in New York.

How does our philosophy affect the bottom line? We've grown at an average annual rate of 30% for 11 years. Since 1983 alone our billings have gone from $58 million to about $140 million. And the quality of our work is second to none.

To us, all of this proves that, in an idea business, you can't legislate quality.

Edward H. Hick is President and Chief Operating Officer of Ammirati & Puris Inc.

4) Whether you currently work under flex time or not, please indicate if you believe each of the following statements about flex time are true or false.

AGENCIES	True	False	No answer
It increases productivity	62.8%	36.0%	1.2%
It is disruptive of office routine	55.8	41.9	2.3
It leads to happier employees	87.2	12.8	—
It leads to morale problems	26.5	72.2	2.3
Employees are honest in meeting their hourly quotas	74.4	22.1	3.5
Employees take advantage of the system	39.5	57.0	3.5
Base: 86			

ADVERTISERS	True	False	No answer
It increases productivity	64.6%	31.7%	3.7%
It is disruptive of office routine	47.6	48.7	3.7
It leads to happier employees	85.4	12.2	2.4
It leads to morale problems	13.4	80.5	6.1
Employees are honest in meeting their hourly quotas	79.2	17.1	3.7
Employees take advantage of the system	18.3	74.4	7.3
Base: 82			

5) In the summer, does your office close early or close on Fridays?

	Agency	Advertiser	Total
Yes	34.9%	18.3%	26.8%
No	65.1	81.7	73.2
	100%	100%	100%
Base:	(86)	(82)	(168)

6) If yes,

FOR AGENCIES: Do you think clients are frustrated by your shortened hours?

Yes	30%
No	70
	100%
Base: 30	

FOR ADVERTISERS: Do you resent it when your agency closes early?

Yes	26.7%
No	73.3
	100%
Base: 15	

7) How many hours do you usually work in a week?

	Agency	Advertiser	Total
30	1.2%	—%	0.6%
35	7.0	1.2	4.2
40	17.4	12.2	14.9
45	30.2	13.4	22.0
50	23.3	42.7	32.7
55	7.0	11.0	8.9
60	11.6	11.0	11.3
65	2.3	2.4	2.4
70	—	1.2	0.6
No answer	—	4.9	2.4
	100%	100%	100%
Median	45 hours	50 hours	50 hours
Base:	(86)	(82)	(168)

ECONOMIC EYE

THE BIZ PUBLISHING BIZ

Like one year, like another, is how James B. Kobak, chief executive of James B. Kobak & Co., frames a mildly optimistic outlook for trade books. "I don't see any great change in the trend from the past few years," he says. "I expect pages will move up 1% or 2% or so, and ad rates will go up 5% or 6%."

Kobak is also quick to point out that predictions, like trade books themselves, vary by industry. The fragmentation that marks the business challenges overall predictions, he notes, since "you see oil dying and who knows what's going on in the computer business."

Nevertheless, he offers some insights. "The service industries are the places where the growth will come. The financial area, for one, will be very strong," he says. "The beauty parlor business is hot. I expect housing to bounce back. Even machine tools are doing a little better in this disastrous era." The signs he reads are bleaker, though, for books covering automobiles, computers and oil.

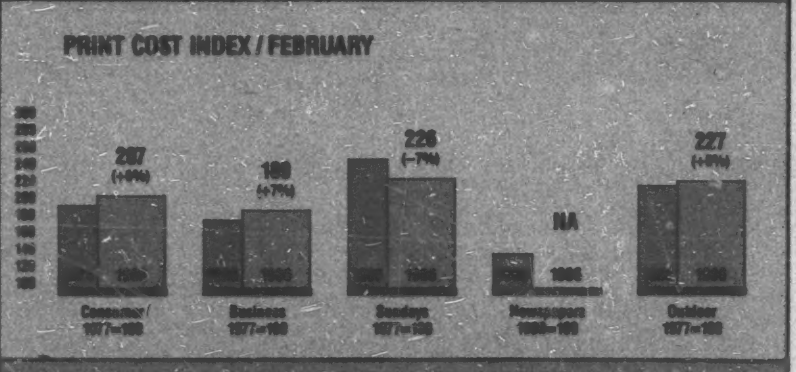
He sees no signs that the current acquisition wave will stop. "You'll keep seeing big companies buying up business books, and you'll keep seeing big companies get rid of the little guys who don't bring in a profit."

Kobak looks for more books in troubled industries to refocus and more beleaguered publishers to consolidate. And then there will be more shakeouts as industries contract. "It'll happen in the computer industry; it already has," he says. "Business papers will have to adapt to what's going on in their industries."

But any pending group plans don't strike him as the answer. "I don't think they work very well," he says. "Ziff-Davis and Petersen had group plans for years, and they hardly made a dent in the overall sales." *Fred Pfaff*

MAGAZINE AD SCORECARD	Ad Pages Apr. 1986	% change from Apr. 1985	Dollars spent (000)	% change from Apr. 1985
1. Skin care, Creams, Lotions and Oils	159.42	−1.6%	$ 4,883.3	+20.6%
2. Lip and Eye Beauty Products	96.92	−37.9	3,581.3	−29.7
3. Scents and Fragrances	210.71	+6.3	5,255.7	+15.2
4. Facial Makeup Products	72.89	+28.7	2,611.2	+12.3
5. All other prepared Grocery and entrees	26.57	−50.8	1,848.4	−46.7
6. Liquor	341.95	−19.3	13,744.2	−19.5
7. Cigarettes	774.91	+25.6	39,456.2	+20.3
8. Soaps and Detergents	47.81	+62.0	3,200.5	+80.6
9. Passenger Cars, Domestic	402.73	−19.7	20,236.7	−1.7
10. Passenger Cars, Imported	446.57	−4.2	19,846.7	−1.4

Source: Publishers Information Bureau as prepared by Leading National Advertisers



Sources:

Nighttime Network TV—Cost per average 30-second spot, 7:30-11 p.m. Monday-Saturday and 7-11 p.m. Sunday, from Broadcast Advertisers Reports (BAR) Network TV Service.

Daytime Network TV—Cost per average 30-second spot, 10 a.m.-4:30 p.m. Monday-Friday from BAR's Network TV Service.

Network Radio—Cost per average 30-second radio announcement from BAR's Network Radio Service.

Consumer Magazine—Estimate based on reported SRDS cost of a page, four-color in 40 national consumer magazines, as reported by Magazine Publishers Assn.

National Business Mags—Estimate based on published (rate card) costs of a page, four-color in the national edition.

Daily Newspapers—Estimate based on Newspaper Advertising Bureau report of SRDS costs per agate line of a sample of 784 newspapers weighted to represent the universe.

Business Publications—Estimate based on reported SRDS cost of a page, four-color in 48 publications representing 42 business and professional classifications.

Outdoor Posters—based on estimate prepared by Institute of Outdoor Advertising.

Spot Radio Index—represents cost of a 30-second spot in the top 100 markets from data supplied to Radio Expenditure Reports by major radio representatives.

How to read: Media Cost Index reflects latest available costs compared with base year. Percent change shows rate of change from the same month in previous year.

YH=Yearly index high. YL=Yearly index low. YA=Average 1986 index.